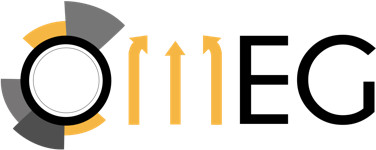
`

Tech Specs Document

Brand Personal banking–Balance Transfer

by

OMEG Digital Technology Solutions



Date

##### March 23, 2023

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Brand– Balance Transfer Section

1. About Brand – Balance Transfer

Brand personal banking offers loan application for the customer who are new and existing to bank.

This tech spec specifies the details about the balance transfer and its interactions.

###### 

# What this Tech Spec covers?

This tech spec covers the data layer instruction for the pages a user might take under **balance transfer.**

* Personal Info Page
* Otp Verification Page
* Share Credit Records Page

## 2.1. Data Layer Variables Used

|  |  |  |  |
| --- | --- | --- | --- |
| Data layer variable | | Sample Values | Where to set |
| Page Level | pageName | sg:brand:personal:loans:balance-transfer:<<product name>>:personal-info | All pages |
| language | en | All pages |
| CIF (Encrypted only) | 1234511 | All pages |
| pageCategory | Pre login application page | All pages |
| bannerName | TBD by brand | On pages, where  banner is displayed |
| channel | loans | All pages |
| country | sg | All pages |
| pageType | <<information/application>> | All pages |
| platform | web | All pages |
| lob | inb | All pages |
| Event | pageView | true | All pages |
| sessionTimeout | true | Session Timeout  popup page |
| errorEvent | true | Error page |
| bannerImpression | true/false | To be set true only when banner is visible  on the page |
| Application | applicationId | <<application Id>> | All pages |
| flowStep | <<step number>> | Where required |
| flowType | loans flow | All pages |
| journeyName | loan application form | All pages |
| subJourneyName | <<via easicredit>> | All pages |
| applicationStatus | <<approved/pending>> | Where required |
| Product | productid | <<bt>> | All pages |
| productCategory | <<loan>> | All pages |
| productSubCategory | <<personal loan>> | All pages |
| productType | <<unsecure loans>> | All pages |
| productName | <<balance transfer>> | All pages |

## Deployment Steps

###### On every page of the site:

* + - Page naming is owned by the business team and as such the values should be provided by them. Please coordinate with the business team and leverage the page naming spreadsheet created by them to identify and name each page with the right context value
    - The pageName variable value should be a clear, contextual, concise, and unique value that does not exceed 100 bytes
    - The pageName variable should be populated on all pages of the site in the following format:

s.pageName="[site country]:[site brand/name]:[channel]:[site section1]:[site section2]:[descriptive page name]";

If a site doesn’t use all the sections, then just leave those out of the name

#### Order of Sequence:

The following order sequence must be followed for efficient tracking and avoiding any technical issue.

#### jQuery CDN

#### Data Layer

#### Pre-hiding Script

#### Launch Script & Page Load Event Trigger Instructions on jQuery:

Developer to include jQuery CDN on all pages before the data layer is placed.

#### Instructions on Data Layer:

Each Page/Screen will have a set of standard defined data layer that will updated on that specific page load. The detailed data layer instruction is given further in the document. **All data layer values must be in lower case.**

#### Pre-hiding Script Inclusion:

Pre-hiding script is to be placed at the top in the head section. This script helps in avoiding flickering issue. This script should be placed before the data layer as well as the launch. Following code is the pre-hiding snippet.

#### Instructions on Launch Script & Page view event trigger:

Developers required to place the launch script on all pages after the data layer for the respective environment.

#### Development:

#### Production:

Here is the launch trigger that must be placed on all pages after the window is loaded. This event trigger will help in tracking each page/screen separately.

#### \_satellite.track('pageView');

## Page Load Tracking

### Personal Info Page:

Figure : Personal Info Page

The following variables should be set on load of Personal Info Page:

var brandData = { page: {

pageName: "sg:brand:personal:loans:balance-transfer:application:personal-info",

language: "en",

pageCategory: "pre-login application page", bannerName: "",

channel: "loans",

country: "sg",

lob: "brand personal banking",

platform: "web",

pageType: "application"

},

product: {

productid: "bt",

productCategory: "loan",

productSubCategory: "personal loan",

productType: "unsecure loans",

productName: "balance transfer"

},

application: {

applicationId: "<<application id>>",

flowStep: "",

flowType: "loans flow",

journeyName: "loan application form",

subJourneyName: "",

applicationStatus: "",

myInfoStatus: ""

},

user: {

CIF: "<<12345>>", //should be passed post login BRAND specific encrypted ID loginStatus: "<<login status>>"

},

event: {

pageView: "true",

bannerImpression: ""

}};

###### Note for Developer:

* Developer required to pass dynamic value according to the specific page for <<>>
* Developer required to pass product and application variable details dynamically.
* Developer required to trigger the page view event trigger on window load.

### Enter Otp Page:

Figure : Enter Otp Page

The following variables should be set on load of Enter Otp Page:

var brandData = { page: {

pageName: " sg:brand:personal:loans:balance-transfer:application:otp-verification",

language: "en",

pageCategory: "pre-login application page", bannerName: "",

channel: "loans",

country: "sg",

lob: "brand personal banking",

platform: "web",

pageType: "application"

},

product: {

productid: "bt",

productCategory: "loan",

productSubCategory: "personal loan",

productType: "unsecure loans",

productName: "balance transfer"

},

application: {

applicationId: "<<application id>>",

flowStep: "",

flowType: "loans flow",

journeyName: "loan application form",

subJourneyName: "<<via easicredit>>",

applicationStatus: "",

myInfoStatus: ""

},

user: {

CIF: "<<12345>>", //should be passed post login BRAND specific encrypted ID loginStatus: "<<login status>>"

},

event: {

pageView: "true",

bannerImpression: "" //set true only when banner is visible on the page

}};

###### Note for Developer:

* Developer required to pass dynamic value according to the specific page for <<>>
* Developer required to pass product and application variable details dynamically.
* Developer required to trigger the page view event trigger on window load.

### Credit Record Page:

Figure 3: Credit Record Page

The following variables should be set on load of Credit Record Page:

var brandData = { page: {

pageName: "sg:brand:personal:loans:balance-transfer:application:credit-records",

language: "en",

pageCategory: "pre-login application", bannerName: "",

channel: "loans",

country: "sg",

lob: "brand personal banking",

platform: "web",

pageType: "information"

},

product: {

productid: "bt",

productCategory: "loan",

productSubCategory: "personal loan",

productType: "unsecure loans",

productName: "balance transfer"

},

application: {

applicationId: "<<application id>>",

flowStep: "",

flowType: "loans flow",

journeyName: "loan application form",

subJourneyName: "<<via easicredit>>",

applicationStatus: "",

myInfoStatus: ""

},

user: {

CIF: "<<12345>>", //should be passed post login BRAND specific encrypted ID loginStatus: "<<login status>>"

},

event: {

pageView: "true",

bannerImpression: "" //set true only when banner is visible on the page

}};

###### Note for Developer:

* Developer required to pass dynamic value according to the specific page for <<>>.
* Developer required to pass product and application variable details dynamically.
* Developer required to trigger the page view event trigger on window load.

## Page Interaction Tracking

### Next Button:

Figure : Next Button

Developer also needs to trigger below event on the click of Next Button.

\_satellite.track('siteInteraction', {

'data-ctaname': 'personal-info:get-started:next',

'data-ctatype': 'button',

'data-ctaposition': 'body',

'flowType': 'loans flow',

'journeyName': 'loan application form',

'subJourneyName': '<<via easicredit>>',

'productid': 'bt',

'productCategory': 'loan',

'productSubCategory': 'personal loan',

'productType': 'unsecure loans',

'productName': 'balance transfer'

});

### I Need a New Otp Link:

Figure 5: I Need A New Otp Link

Developer also needs to trigger below event on the click of I need a New Otp link.

\_satellite.track('siteInteraction', {

'data-ctaname': 'authorise-login-using-sms-otp:i-need-a-new-otp',

'data-ctatype': 'link',

'data-ctaposition': 'center',

'flowType': 'loans flow',

'journeyName': 'loan application form',

'subJourneyName': '<<via easicredit>>',

'productid': 'bt',

'productCategory': 'loan',

'productSubCategory': 'personal loan',

'productType': 'unsecure loans',

'productName': 'balance transfer'

});

# Site Testing and Validation

Development team to perform sanity test at their end before handing over to the analytics teams. The sanity test can be classified into two board categories.

* + Page Load Analytics Validation
  + Page Interaction Validation

#### Page Load Analytics Validation steps

In this validation, our focus is to check if the page load tracking is working as expected once the data layer implementation is done. Go to any page, open the network tab, and check for the following:

* Launch script: To check for launch script type “launch” in the filter and check if the launch script is

loading or not.

* Analytics Beacon (interact): If the launch script is loading, the next step is to check the analytics

beacon. Filter with “interact” in the network tab, to validate the analytics tracking.

**Note**: Please make sure to check the preserve log in network before testing.

#### Page Interaction Validation Steps

For validating, page interaction developer to follow the below steps:

* + Open the Network tab
  + Add interact in the filter.
  + Click on the respective CTA button/link where analytics is implemented.

On the click the analytics call should be triggered

# Revision History

|  |  |  |  |
| --- | --- | --- | --- |
| Date | Created By | Status | Comments |
| March 22, 2023 |  | Sent for review | Initial Draft Version |