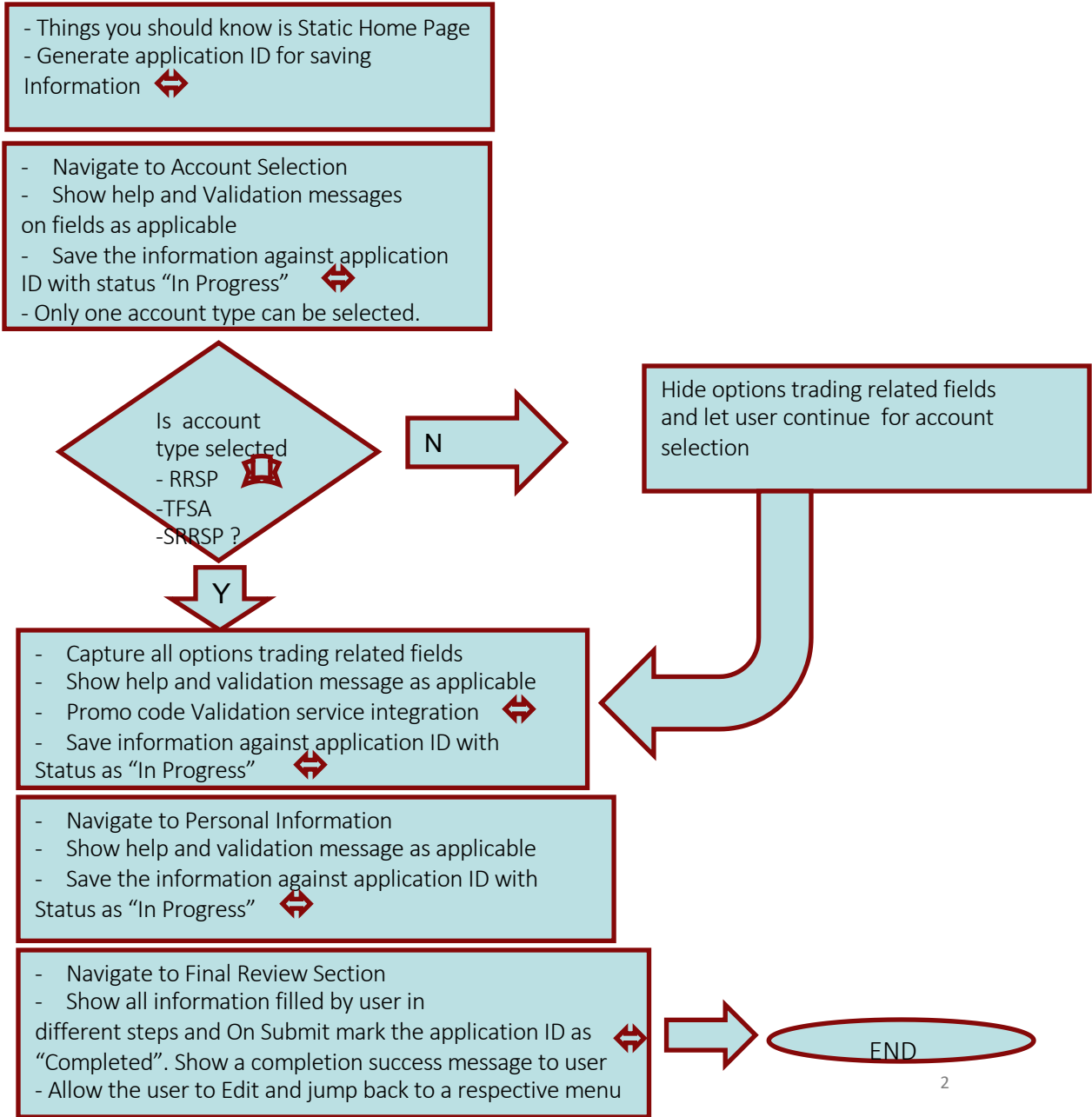




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**Dev Hackathon**  
**- 6<sup>th</sup> March 2021**

# Flow Diagram BMO

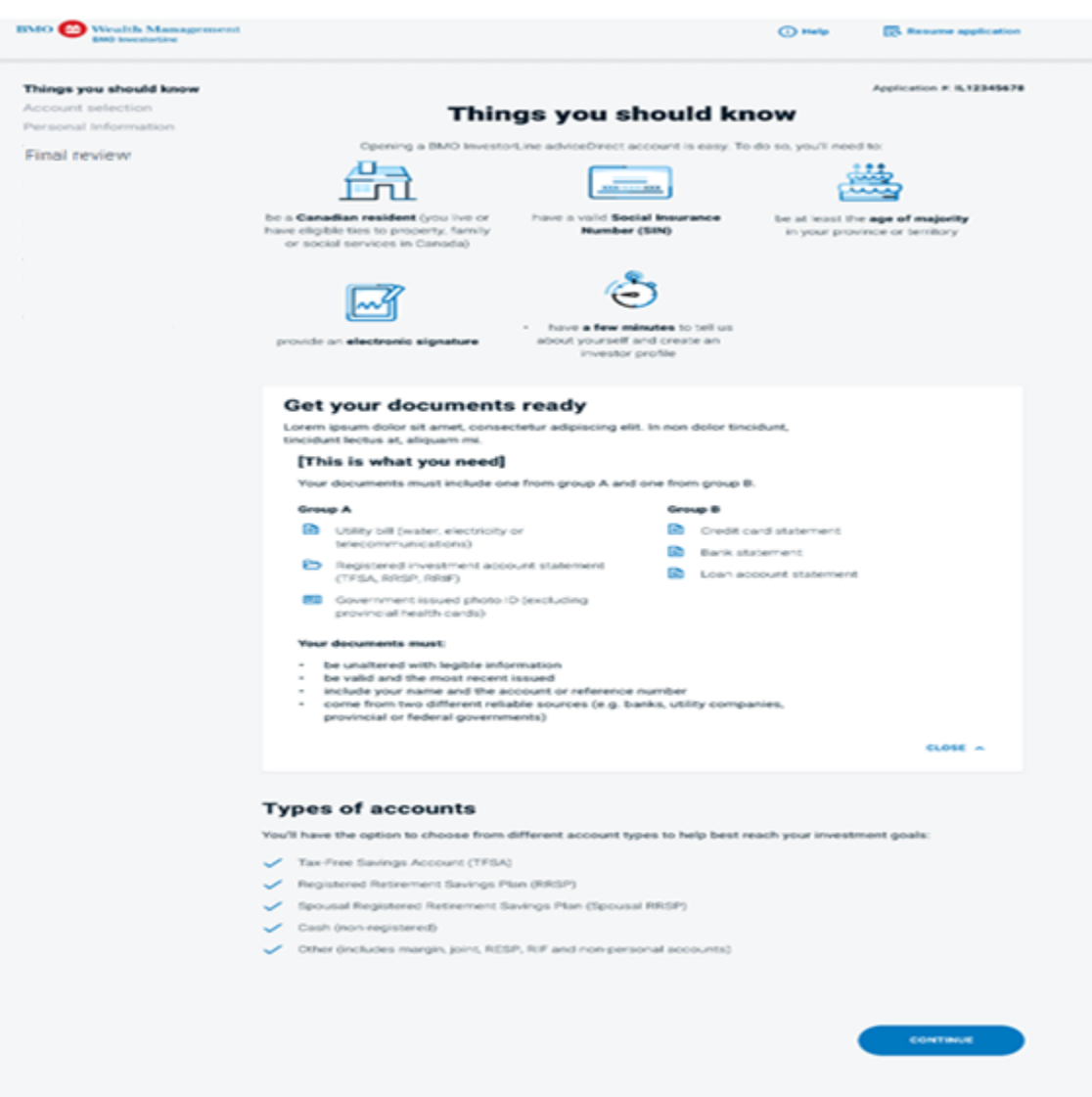


 Future Extension expected  
 Service Integrations

**Note:** Use lorem ipsum as text if we have missed to provide or help text

Initiative - BMO Wealth Hackathon		
User Type	Epic	User Story
Self-Serve BIL user	Account_Opening_Landing Page	1) As a self-serve SD/aD applicant, <b>when</b> I am on SD/aD “Things you should know” menu <b>then</b> , I should be presented with “Things you should know” screen 2) As a self-serve SD/aD applicant I should be able to see my Application ID for reference at launch of “Things you should know”
Self-Serve BIL user	Account_Opening_Account_Selection	1) As a SD applicant , <b>when</b> click on Account Selection menu, I should be able to select account type and opt for options trading. 2) As a SD applicant I should be presented with error messages <b>when</b> mandatory fields are not filled or invalid values are entered. I should be given contextual help as applicable 3) As a SD applicant <b>when</b> I enter a valid Promo code “ABC12345” and tab out of the field then consent checkbox and T&C pdf link associated to the promo code should be displayed. <b>If</b> I clear the promo code field, default view is displayed with No consent checkbox and T&C link. The T&C pdf link are associated to the promo code. On Change of promo code relevant PDF link to be displayed.
Self-Serve BIL user	Account_Opening_Personal_Information	1) As a SD applicant <b>when</b> I click on “Personal Information” menu, <b>then</b> I should be able to provide all my personal information needed to complete the process. 2) As a SD applicant I should be presented with error messages <b>when</b> mandatory fields are not pfilled or invalid values are entered. I should be given contextual help as applicable
Self-Serve BIL user	Account_Opening_Final_Review	1) As a SD applicant <b>when</b> I navigate to the “Final Review ” menu, <b>then</b> I should be able to review all values already entered while filling form 2) As a SD applicant <b>when</b> I click on EDIT in “Final Review ” sections, <b>then</b> I should be able to navigate to the Specific screen(Account Selection or Personal Information) and view the information to EDIT. (Optional)
Self-Serve BIL user	Account_Opening_Generic	1) As a SD applicant I should have a option to toggle language English and French toggle button in the HEADER. By Default the language will be English. The design and code should be accommodative of multilingual support. As a minimum viable product, “Things you should know” format is final but design is not final. English and French content should be

# Screenshot and Field Details –“Things you should know”



Content Section (English Placeholder labels)	Field/Character Type	Special Conditions/Exceptions/Description
SD "Things you should know"	Text and Image	List of information required to open an account (as per mock-up). I.e., Canadian residents, SIN and Image associated with the list of items required.
Get your documents ready	Text and accordion link	Default view is collapse  User can be able click on the accordion link to expand/collapse view  List of documents required for dual method ID verification
Type of accounts	Text	List of account types

# Screenshot and Field Details –“Account Selection”

BMQ Wealth Management

BMQ InvestorLine

Help

Things you should know

Account Selection

Personal information

Final review

Select your account

Let's get started. Simply choose which account you'd like to open.

Tax-Free Savings Account (TFSA)

SELECT

Registered Retirement Savings Plan (RRSP)

SELECTED

Cash (non-registered)

SELECT

Spousal Registered Retirement Savings Plan (Spousal RRSP)

SELECT

Other accounts

Includes margin, joint, registered, corporate and non-personal accounts.

LEARN MORE

Learn more about the benefits of each account

Want to add options trading?

Yes No

How many years of experience do you have trading options?

Number of years

How would you describe your options trading knowledge?

Options trading knowledge

None

Limited

Knowledgeable

Expert

Long Calls / Puts

Covered Calls / Puts

Spreads

Never traded options before

What type of options would you like to trade in your account?

Long Calls / Puts

Covered Calls / Puts

Covered puts can only be traded in non-registered margin accounts that allow short selling (TFSA's, RRSP's or Spousal RRSP's are excluded).

Field ID	Field Name English (Placeholder labels)	Field/Character Type	Default Value	Editable (Y/N)	Mandatory (Y/N/C)	Special Conditions/Exceptions
PWOB.317	Do you want to add options trading to your account?	Single Selection Yes or No	Unselected	Y	C	Display this field, if one of the following account types is selected -RRSP -TFSA -SRRSP  Help Icon is displayed for help contents and clicking the help icon a tool tip (pop-up) will open up with contextual help
PWOB.920	How many years of experience do you have trading options?	Input field	Blank	Y	C	Display this field if yes selected for option trading question
PWOB.921.a	How would you describe your options trading knowledge?	Dropdown	Unselected	Y	C	Display this field if yes selected for option trading question
PWOB.921	What type of options have you traded before?	Checkbox	Unselected	Y	C	Display this field if yes selected for option trading question  User must select one or more selection
PWOB.922	What type of options would you like to trade in your account?	Check Box	Unselected	Y	C	Display this field if yes selected for option trading question  User must select one or more selection

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## Screenshot and Field Details – “Account Selection” – Promo Code

**Promo code**

If you've got a code for one of our current offers, easily enter it here. Or, if you notice one that's already been added, simply select 'Apply' and you're good to go.

[Enter promo code](#)

ABC12345

✓ Success! Promo code applied

☐ To continue, please accept the promotion's [terms and conditions](#).

**Promo code**

If you've got a code for one of our current offers, easily enter it here. Or, if you notice one that's already been added, simply select 'Apply' and you're good to go.

[Enter promo code](#)

# Screenshot and Field Details –“Personal Information”

### What's your name?

Enter your name as it appears on your Canadian government-issued photo ID (e.g. passport, driver's license, etc.).

Prefix ⓘ

Mr/M

Ms/Mme

Mrs

Miss

Dr

None

First name

Initial (Optional)

Last name

### What's your date of birth?

Select your birthday with our handy calendar tool. It will open as a small window so you can choose the right date.

MM | DD | YYYY

ⓘ

### What's your Social Insurance Number?

Social Insurance Number

 ⓘ

### Are you a Canadian citizen?

Yes

No

CONTINUE

CDI Element ID	CDI Element Name	UI Label	UI Type	Default Value
PWOB.005	Title – Selections	Prefix	Selection	Un Selected
PWOB.005	Legal Firstname	First Name	Input Field	Blank
PWOB.006	Middle name initial (Optional)	Initial (Optional)	Input Field	Blank
PWOB.007	Legal Last name	Last Name	Input Field	Blank
PWOB.008	Date of Birth	[When's your birthday?]	Calendar (Day Picker)	Blank
PWOB.009	Social Insurance Number Mod9 Validation required	[What's your Social Insurance Number?]	Input Field	Blank

# Screenshot and Field Details –“Final Review”

BMO

Wealth Management

BMO InvestorLine

Help

Account type: RRSP

Things you should know

Account Selection

Personal information

Final review

Review your information

Please take a few moments to carefully review your application. Make sure it's accurate as you won't be able to edit the information after you launch the eSignature process.

ACCOUNT SELECTION

EDIT

Options trading:

Yes

Years of experience trading options:

7

Options trading knowledge:

Limited

Types of options trading you've done:

Long Calls / Puts, Covered Calls / Puts

Type of options you'd like to trade:

Long Calls / Puts, Covered Calls / Puts

Promo code:

None

PERSONAL INFORMATION

EDIT

Applicant's legal name:

Mr/M Testafn TESTMN Testaln

Date of birth:

January 23, 1980

Citizenship:

Canada

Email:

test@test.com

SUBMIT

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HCL

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Content

### Service Integration :

- 1) Generate Application ID on launch
- 2) Save “Lets Go” Account page integration
- 3) Save “Personal Information” on Continue
- 4) Promo validation on tab
- 5) Final review page on Submit