
Customer Acquisition System (CAS)

User Guide

Card Center - February 18

GENERAL USER FUNCTIONS

Below are the guide lines on how to login and make use of the Customer Acquisition System.

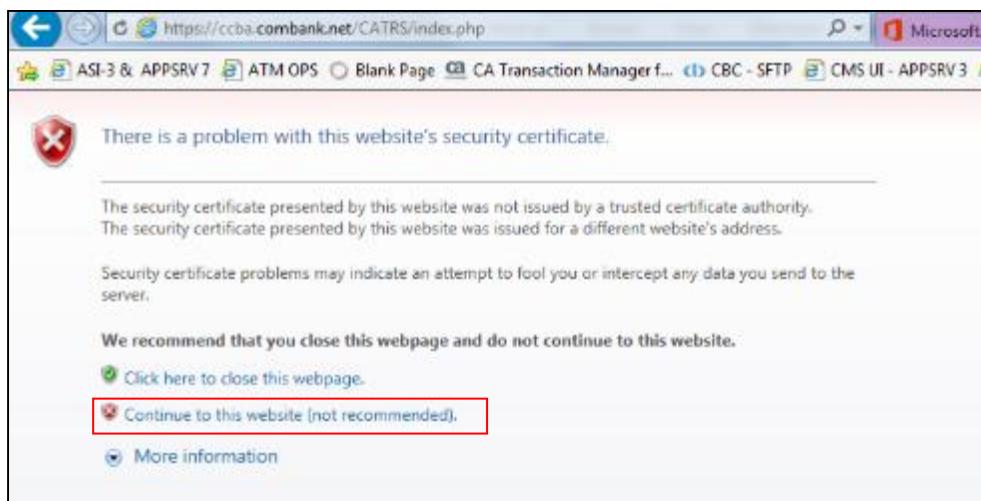
1. Accessing the System

You can access the system through the main landing page of Intranet under “Systems” as depicted below.

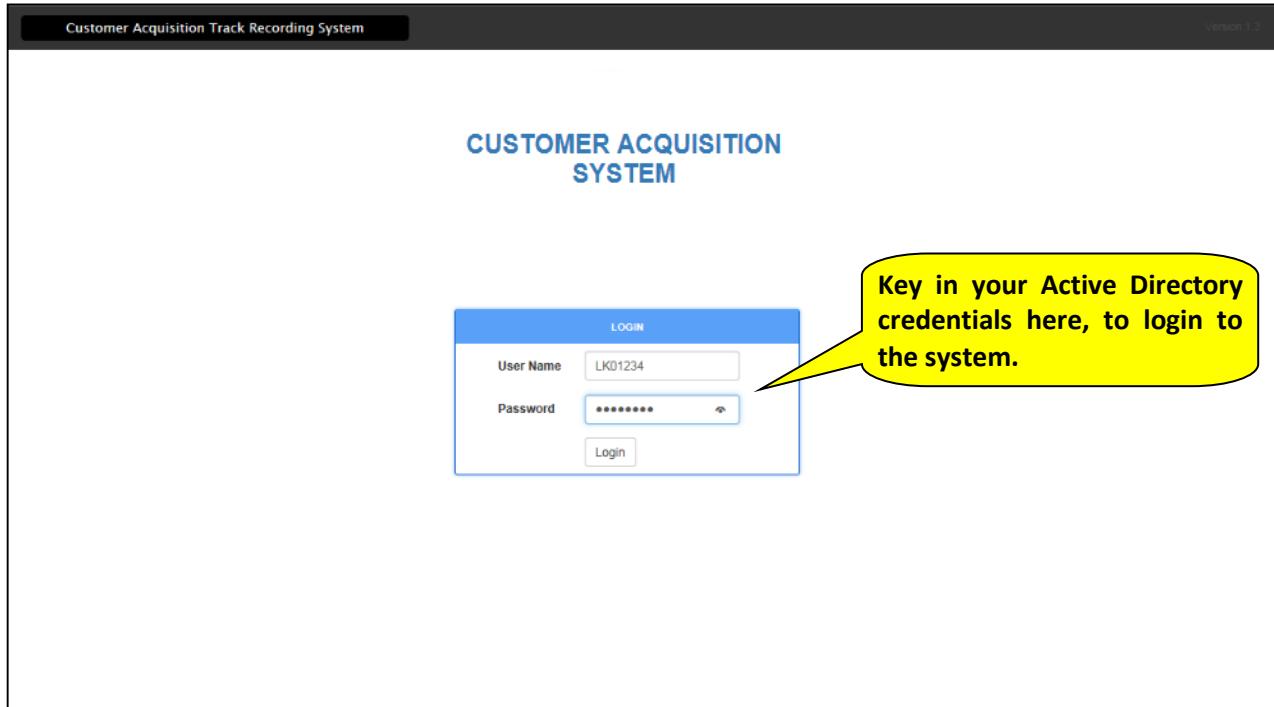
The screenshot shows the COMBANK INTRANET homepage. At the top, there's a banner with the text "SELL MORE CRED" and "Get your Branch / Department Rew". Below this, a section titled "WELCOME TO COMBANK INTRANET" features a "PROMOTIONS ON CARDS" box with links to "CURRENT PROMOTIONS" and "ZERO% INSTALMENT SCHEME". To the right, there's a "NOTICE BOARD" section with a list of medical health check-up details. Further down, there are sections for "INTEREST RATES", "FOREX RATE SHEET", and "TREASURY RATES". A "SEARCH COMBANK INTRANET" bar is also present. On the left side, there's a "SYSTEMS" menu with various links, and one item, "Customer Acquisition System", is highlighted with a red box. On the right side, there are boxes for "BREAKING NEWS", "EVENT CALENDAR", and "EMERGENCY NUMBERS".

Note: Please use Internet Explorer 10 or Google Chrome for better functionality

In case the following error message appear on your screen, please click “Continue to the website (not recommended) link



2. Sign on to Customer Acquisition Track Recording System



3. Once sign-on, you will be presented with the following screen

Total Customers	- 243
Remaining	- 233
Called	- 10
Schedules	- 1
Interested	- 4
Not Interested	- 1
Cannot be Contacted	- 1
Card In an Other Bank	- 1
Not Eligible	- 1
Like to Visit Branch	- 0
Other Reason	- 1

4. Once you click on a customer name in the list, a screen with below information will appear.

The screenshot shows the 'Customer Information' panel for a selected customer. The customer's name is MR D SANDARUWAN MADHURANGA DASANAYAKE. The panel includes fields for Name, Gender (Female), Age (30), Phone1 (0712532489 0335687356), Phone2 (712532489), Branch Name (GAMPANA BRANCH), Address (MR D SANDARUWAN MADHURANGA DASANAYAKE NO 218/3 BATAPOTHA MADELGAMUWA), Email, Batch Code (171109090452), and CIF (10472065). A red box highlights the 'Call' button in the top right corner. A yellow callout bubble on the left says 'Click on a Customer record. (Records are to be selected on ascending order)'. A yellow callout bubble on the right says 'Once a customer record was selected, system will display the details of that customer.' and 'Using the CIF, user should peruse the customer information to weed out any undesirable customer prior to calling. Once the potential is confirmed, call may be placed with the customer.' Another yellow callout bubble says 'Branch user may now start calling the customer using the above information. (Phone numbers)'.

5. After calling the customer you're required to record the response received from the customer by clicking button. Once the button is clicked following screen will appear.

The screenshot shows the 'Customer Acquisition Status' dialog box. It contains tabs for 'Interested' (selected) and 'Schedule'. Under 'Interested', there are buttons for 'Cannot Be Contacted', 'Not Eligible', 'Card In an Other Bank', 'Not Interested', 'Like to Visit Branch', and 'Other Reason'. A red box highlights this section. A yellow callout bubble on the right says 'This section lists out all the possible actions which could be taken after a call.' and 'Functionality and how to act in each of the actions are explained in next few sections'.

ACTIONS to be taken after calling customers

6. If the customer is INTRESTED

Step 01

The screenshot shows the 'Customer Information' panel for a customer named MR D SANDARUWAN MADHURANGA DASANAYAKE. The 'Status' section includes a 'Click here' button, an 'Interested' button (which is highlighted with a red box), and other options like 'Schedule', 'Cannot Be Contacted', 'Not Eligible', etc. The application type is listed as 'VISA'.

Step 02 – Marking the method which the application was delivered to the customer

The screenshot shows the 'Customer Information' panel for a customer named MR BALACHANDRAN RISAATH. The 'Application' field is set to 'Master Card'. The 'Application Processing Details' section is highlighted with a red box, specifically the 'Sent Method' dropdown which lists options like 'Sent t...', 'Collected from Branch', 'Sent through an Agent', etc.

Step 03 – Enter the application sent date and remarks if any

The screenshot shows the 'Customer Information' panel for a customer named MR BALACHANDRAN RISAATH. The 'Application' field is set to 'Master Card'. The 'Application Processing Details' section is highlighted with a red box, specifically the 'Sent Date' field containing '2018/01/12' and the 'Remarks' field containing 'sent to the customer's office'. The 'Save' button at the bottom right is also highlighted with a red box.

Step 04 – After the application received by the customer, perform the following

The screenshot shows the 'Customer Acquisition Track Recording System' interface. On the left, a list of customers is shown under the heading '#Customers'. In the center, 'Customer Information' details are displayed: Name (MR BALACHANDRAN RISAATH), Gender (Male), Age (33), Phone1 (0333 7795), Place (KALUBOWILA), and Email. On the right, 'Customer Acquisition Status' is shown, specifically the 'Interested' section. It includes a 'Call' button, a note about Application Master Card, and an 'Application Processing Details' section. This section contains a checked checkbox for 'Application Received by Customer' and a date field set to '2018/01/14'. A yellow callout box with red text instructs: 'Key in the Date the application was received by customer. Click Save..'. A red box highlights the 'Save' button.

Step 05 – Once the completed application received from the customer, perform following task

The screenshot shows the same system interface. The '#Customers' list now shows 'Showing Interested Customers'. In the 'Customer Information' section, the name is MR A ARACHCHIGE LAHIRU NAYANAJITH KUMARA. The 'Customer Acquisition Status' section shows the 'Interested' status with an 'Application Processing Details' section containing a checked checkbox for 'Application Delivered to the Branch' and a date field set to '2017/11/15'. A yellow callout box with red text instructs: 'Key in the Date the application was received by the Branch from customer. Click Save..'. A red box highlights the 'Save' button.

How to filter the records already attended by the Branch but yet to complete

Branches are required to Filter and view the list of already attended Customers, but not yet completed on a DAILY BASIS.

The screenshot shows the '#Customers' list with various names listed. A yellow callout box points to the 'Filter' button in the top right corner of the list area, with the text: 'Filter by “Schedules” to view the customers in scheduled status'. Another yellow callout box points to the 'Interested' option in the dropdown menu, with the text: 'Filter by “Interested” to view the customers in interested status.'

Note: Branch users are required to Follow-up the customers list appears above till all the steps are completed.

7. If the customer wanted to **SCHEDULE** a call for a future date

Sometimes the customers may want the caller to call in a future date. In that case the branch user can schedule a call for a future date as follows. However this will not generate any notifications and they have to check the system to know the dates.

Please click [here](#) to see How to filter the records already scheduled.

The screenshot shows the 'Customer Acquisition Track Recording System' interface. On the left, there's a sidebar with a search bar and buttons for 'All Customers', 'External', and 'Predicted'. The main area has two tabs: 'Customer Information' and 'Customer Acquisition Status'. In 'Customer Information', details for a customer named 'MR D SANDARUWAN MADHURANGA DASANAYAKE' are shown, including gender (Female), age (30), phone numbers, branch name ('GAMPaha BRANCH'), address, email, and batch code. In the 'Customer Acquisition Status' tab, there are several buttons: 'Interested' (highlighted with a red box), 'Schedule' (also highlighted with a red box), 'Cannot Be Contacted', 'Not Eligible', 'Card In an Other Bank', 'Not Interested', 'Like to Visit Branch', and 'Other Reason'. Below these buttons are fields for 'Scheduled Date' (set to 2017/11/22) and 'Time' (set to 3:10 PM). A 'Remarks' field contains the text 'MR D SANDARUWAN MADHURANGA DASANAYAKE NO 218/3 BATAPOTHA MADELGAMUWA'. A 'Save' button is at the bottom right.

8. If the customer is **NOT INTERESTED**

This screenshot is similar to the previous one, showing the 'Customer Acquisition Track Recording System'. The 'Customer Information' tab shows details for 'MR D SANDARUWAN MADHURANGA DASANAYAKE'. The 'Customer Acquisition Status' tab has buttons for 'Interested' (highlighted with a red box), 'Schedule' (highlighted with a red box), 'Cannot Be Contacted', 'Not Eligible', 'Card In an Other Bank', 'Not Interested' (highlighted with a red box), 'Like to Visit Branch', and 'Other Reason'. A yellow speech bubble points to the 'Not Interested' button. Another yellow speech bubble points to the 'Save' button. The 'Scheduled Date' is set to 2017/11/22 and the 'Time' is 3:10 PM. The 'Remarks' field is empty.

If the customer **CANNOT BE CONTACTED/NOT ELIGIBLE/** has a **CARD IN AN OTHER BANK/** **LKE TO VISIT THE BRANCH** or **NOT INTERESTED**, click the relevant button and state the remark and click "Save"

This screenshot shows the 'Customer Acquisition Track Recording System'. The 'Customer Information' tab displays details for 'MR BALACHANDRAN RISAATH'. The 'Customer Acquisition Status' tab includes buttons for 'Interested', 'Schedule', 'Cannot Be Contacted', 'Not Eligible', 'Card In an Other Bank', 'Not Interested', and 'Like to Visit Branch' (highlighted with a red box). A yellow speech bubble points to the 'Like to Visit Branch' button. Another yellow speech bubble points to the 'Save' button. The 'Remarks' field contains the text 'Will come on Wednesday'. The 'Scheduled Date' is set to 2017/11/22 and the 'Time' is 3:10 PM.