
Customer Acquisition System (CAS)

User Guide

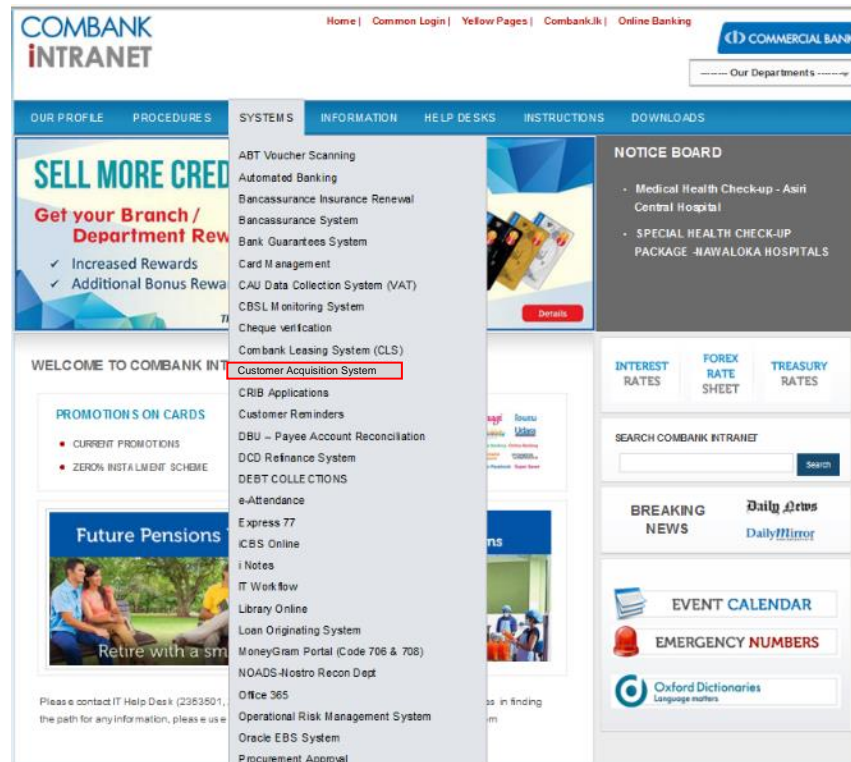
Card Center - February 18

GENERAL USER FUNCTIONS

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

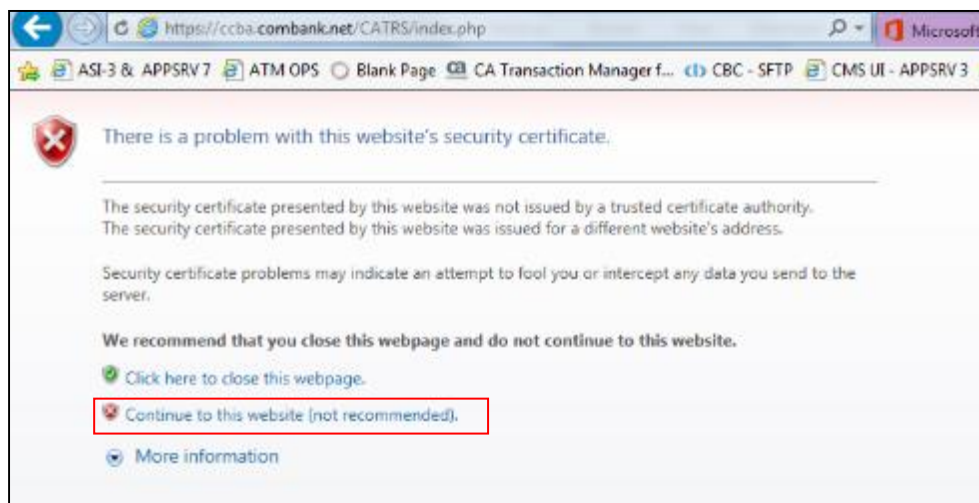
1. Accessing the System

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



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

Customer Acquisition Track Recording System

version 1.3

CUSTOMER ACQUISITION SYSTEM

LOGIN

User Name: LK01234

Password: *****

Login

Key in your Active Directory credentials here, to login to the system.

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

Customer Acquisition Track Recording System

version 1.3

#Customers

All Customers External Predicted

Search for Customer... Got Filter

MR W G PIYUM RAJITH WATHUGALA
MR J P SAJITH MANJULA
MR A ARACHCHIGE LAHIRU NAYANAJITH KUMARA
MR H R M P WIJAYAWARDANA RANAWEEERA
MR KOGGALA WELLALAGE AMILA KASUN
MR K P IDUNIL HARSHA KUMARA
MR GEEGANAGE IRANGA HASITH RUPASINGHA
MR D SANDARUWAN MADIURANGA DASANAYAKE
MR P A IRESH ANURUDDHA PATHIRAJA
MRS R M SUJEEWA DAMAYANTHI RATNAYAKE
MR BRAHAKMANAGE RUWAN CHAMARA
MR A B ASANGA NAMAL PERERA
MR SAMAN DASANAYAKE
MR HEWA RALALAGE RYTHMAL JAYENDRANATH
MR HCR WASANTHA CHAMARA RATHNAYAKE
MR W ROSHAN WIJITHA PERERA
MR J A D V P WIJAYARATHNE JAYASUNDARA
MR H M PIYATHILAKA HERATH
MRS BADDARALAGE MALLIKA
MISS MALLIKA ARACHCHIGE THUSHARI NILMINI
MR K ARACHCHIGE THILAN MADUSHANKA
MR J M DHARMASHI CHETHAN JEEWANDARA
MS H M KOSWATTEGEDARA SANJEEWANI

This list displays all the Eligible Customers for contacting. Selection was based on a logic defined within the system which extracts the most potential customers to be approached for a credit card.

Click here to logoff

First Previous 1 Next Last

#Stats

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

#Completion

4.12%

This list displays a summary dash-board of all the statuses with an item count.

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

The screenshot displays the 'Customer Acquisition Track Recording System' interface. On the left, a list of customers is shown under the '#Customers' tab. A red box highlights the customer 'MR D SANDARUWAN MADHURANGA DASANAYAKE'. A yellow callout bubble points to this entry with the text: 'Click on a Customer record. (Records are to be selected on ascending order)'. On the right, the 'Customer Information' panel shows details for the selected customer, including Name, Gender, Age, Phone numbers, Branch Name, Address, Email, Batch Code, and CIF. A red box highlights a 'Call' button in the top right corner. A large yellow callout bubble contains the text: 'Once a customer record was selected, system will display the details of that customer. 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. Branch user may now start calling the customer using the above information. (Phone numbers)'.

- 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 same system interface, but with the 'Customer Acquisition Status' panel open on the right. This panel contains a 'Cancel' button and a list of status options: 'Interested', 'Schedule', 'Cannot Be Contacted', 'Not Eligible', 'Card In an Other Bank', 'Not Interested', 'Like to Visit Branch', and 'Other Reason'. A red box highlights these status options. A yellow callout bubble points to this section with the text: 'This section lists out all the possible actions which could be taken after a call. 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 **INTERESTED**

Step 01

The screenshot shows the 'Customer Acquisition Track Recording System' interface. On the left, a list of customers is displayed under the '#Customers' tab. The 'Customer Information' panel on the right shows details for MR D SANDARUVAN MADHURANGA DASANAYAKE. The 'Customer Acquisition Status' panel on the far right shows the 'Interested' status selected, with a yellow callout bubble pointing to it that says 'Click here'. Other status options include 'Schedule', 'Cannot Be Contacted', 'Not Eligible', 'Card In an Other Bank', 'Not Interested', and 'Like to Visit Branch'. The 'Application' field is set to 'VISA'. The 'Application Processing Details' section shows '1. Application Sent' checked, with fields for 'Sent Method', 'Sent Date', and 'Remarks'. A 'Cancel' button is visible at the top right of the status panel.

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

The screenshot shows the same system interface as Step 01, but for a different customer: MR BALACHANDRAN RISAATH. The 'Customer Acquisition Status' panel shows 'Interested' selected. The 'Application' field is set to 'Master Card'. The 'Application Processing Details' section shows '1. Application Sent' checked. The 'Sent Method' dropdown menu is open, showing options: 'Sent t...', 'Collected from Branch', 'Sent through an Agent', 'Email', 'Sent by Post', 'post', 'Collect from other Branch', 'to be collected from branch', and 'from Online/Combank Web'. A yellow callout bubble points to the dropdown with the text 'Select the application sending method to the customer.'.

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

The screenshot shows the same system interface as Step 02, for MR BALACHANDRAN RISAATH. The 'Sent Date' field is filled with '2018/01/12' and the 'Remarks' field contains 'sent to the customer's office'. A yellow callout bubble points to these fields with the text 'Select the application sent date and remarks. Click Save..'. The 'Save' button is highlighted with a red box at the bottom right of the 'Application Processing Details' section.

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

Customer Acquisition Track Recording System

#Customers

All Customers External Predicted

Search for Customer... Go! Filter

Showing Not Called Customers

MR W M A VARNAJITH LACHITHA PERERA
MRS VASUKI SRIKANTHAN
MR BADDELIYANAGE DON ASHEN FERNANDO
MR WESLEY STEPHEN PHILIP
MR BALACHANDRAN RISAATH
MR VISHWALINGAM DHANUSHAN RAJ
MR E K KANKANAMGE DIMUTH CHINTHAKA
MR K A DILEEP KUMARA
MR NITHARSHAN NAGARAJAH
MR J A HARSHA RUWAN JAYAWARDENA
MR ANTHONY JEROME SANJAY COPERA

Customer Information

Name: MR BALACHANDRAN RISAATH
Gender: Male
Age: 33
Phone1: 077
Place: KALUBOWILA
Email:

Customer Acquisition Status

Interested

Application: Master Card

Application Processing Details

2. ☒ Application Received by Customer

Date Received: 2018/01/14

Save

1. Application Sent via Sent through an Agent on 2018/01/12
Remark: sent to the customer's office

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

Customer Acquisition Track Recording System

#Customers

All Customers External Predicted

Search for Customer... Go! Filter

Showing Interested Customers

MR W G PIYUM RAJITH WATHUGALA
MR J P SAJITH MANJULA
MR A ARACHCHIGE LAHIRU NAYANAJITH KUMARA
MRS R M SUJEEWA DAMAYANTHI RATNAYAKE

Customer Information

Name: MR A ARACHCHIGE LAHIRU NAYANAJITH KUMARA
Gender: Male
Age: 32
Phone: 0333
Phone: 7793
Branch: GAM
Address: MR A ARACHCHIGE LAHIRU NAYANAJITH KUMARA 2101 DESSIMAHARA IMBULGODA
Email:

Customer Acquisition Status

Interested

Application

Application Processing Details

3. ☒ Application Delivered to the Branch

Date Delivered: 2017/11/15

Save

1. Application Sent via Collected from Branch on 2017/11/13
2. Application Received by the Customer on 2017/11/14

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.

Customer Acquisition Track Recording System

#Customers

All Customers External Predicted

Search for Customer... Go! Filter

Showing Interested Customers

MR W G PIYUM RAJITH WATHUGALA
MR J P SAJITH MANJULA
MR A ARACHCHIGE LAHIRU NAYANAJITH KUMARA
MR H R M P WIJAYAWARDANA RANAWEEF
MR KOGGALA WELLALAGE AMILA KASUN
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MR D SANDARUWAN MADHURANGA DASANAYAKE
MR P A IRESH ANURUDDHA PATHIRAJA
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MR H M PIYATHILAKA HERATH
MRS BADDARALAGE MALLIKA
MISS MALLIKA ARACHCHIGE THUSHARI NILMINI
MR K ARACHCHIGE THILAN MADUSHANKA

Filter

Show All
Called
Remaining
Schedules
Interested
Not Interested

Filter by "Schedules" to view the customers in scheduled status

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, a list of customers is displayed. The main panel shows 'Customer Information' for MR D SANDARUWAN MADHURANGA DASANAYAKE. On the right, the 'Customer Acquisition Status' panel has a 'Schedule' button highlighted with a red box and a yellow callout bubble saying 'Click here'. Other buttons include 'Interested', 'Cannot Be Contacted', 'Not Eligible', 'Card In an Other Bank', 'Not Interested', 'Like to Visit Branch', and 'Other Reason'. Below these are fields for 'Scheduled Date' (2017/11/22) and 'Time' (3:10 PM), and a 'Remarks' text area.

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

The screenshot shows the same system interface. The 'Not Interested' button in the 'Customer Acquisition Status' panel is highlighted with a red box. A yellow callout bubble points to it with the text 'Click NOT INTERESTED. Click save'. The 'Schedule' button is also visible but not highlighted.

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

The screenshot shows the system interface with a different customer, MR BALACHANDRAN RISAATH. The 'Like to Visit Branch' button in the 'Customer Acquisition Status' panel is highlighted with a red box. A yellow callout bubble points to it with the text 'Click the relevant button, put the remark and Click save.'. The 'Remarks' field contains the text 'Will come on Wednesday'. The 'Save' button is also highlighted with a red box.