

Journey of Lead and Campaign Management

HSBC PWS

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Date	Prepared By	Reviewer	Approver & Date of Approval	Version	Change Details
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Distribution List

Team	Person

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1. Introduction

A campaign is an activity undertaken by an Institution to reach out to customers or leads for new business. The Institution can create a campaign for either an event or for the promotion of existing products and services. The target audiences identified by the Institution for a campaign are termed as leads in the system. The response of the leads can be recorded against the campaign and is tracked in the system.

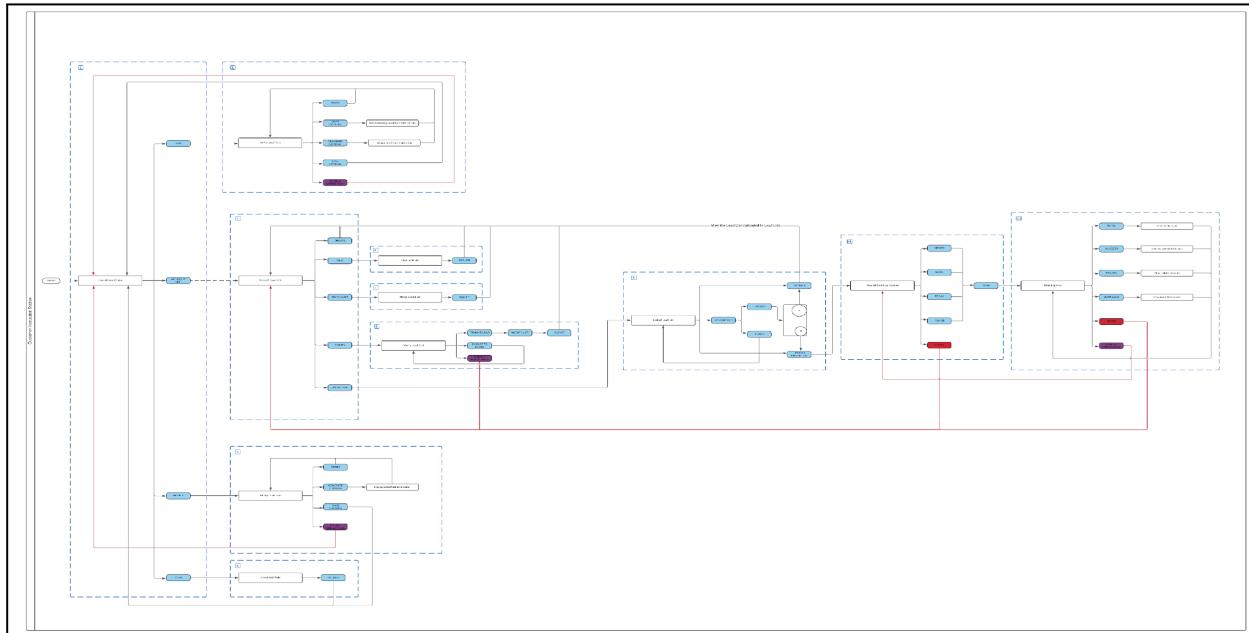
The purpose of this document is to guide the users through the process of creating and managing campaigns, creating and managing a list of intended recipients of the campaign, and recording responses for the underlying campaigns.

2. Prerequisites

S No	Process	Reference Document
1	Prospect Management	Journey of Lead to Prospect and Prospect to Customer
2	Customer Management	Journey of Editing Customer Profile
3	Roles and User Maintenance	Journey of Defining Maintenance
4	Filing a Call report	Journey of RM from Customer Meeting to Closure of Action Items
5	Lead Management	Journey of Lead to Prospect and Prospect to Customer

3. Flow Diagram

1. The below diagrams reflect the process flow for Lead List Management (refer to Glossary for definitions)

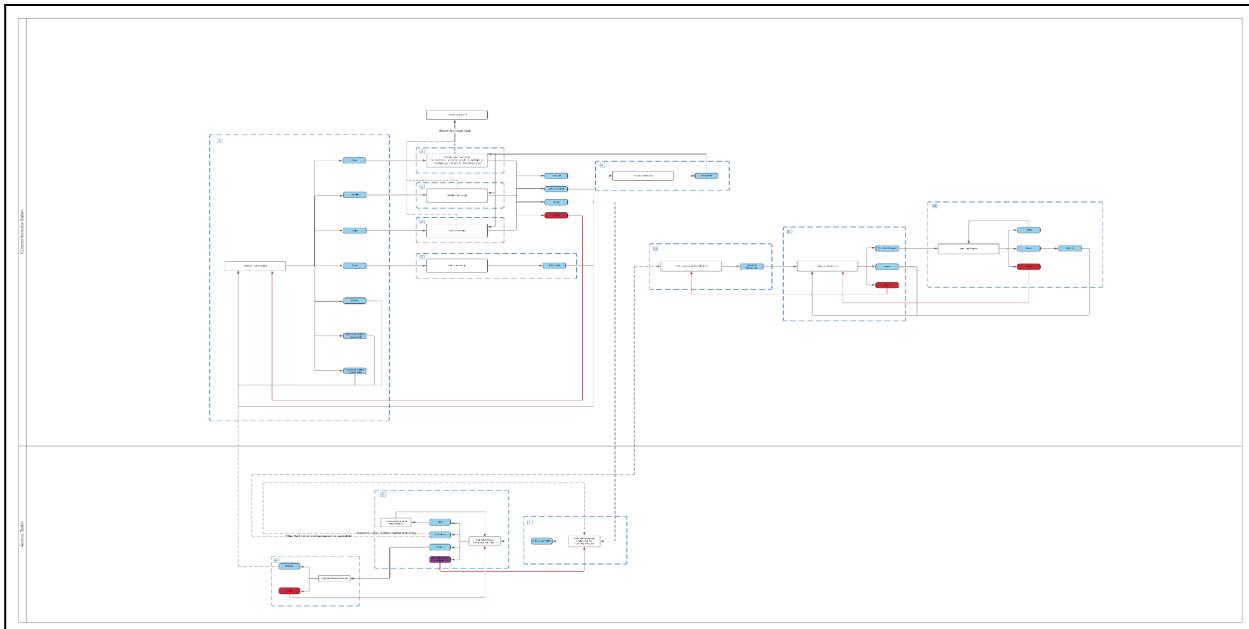


Lead List Management Flow Diagram



Lead List
Management.png

- The below diagram reflects the process flow for Campaign Management at L2, L3 and L4 level



Campaign Management Flow Diagram (L4 View)



Campaign
Management.png

4. Process Description

The journey of suspect to lead consists of Lead List Management and Campaign Management

- a. Lead List Management - This process covers the generation of target audience leads list for the campaign
- b. Campaign Management - This process covers campaign definition, lead generation, capturing the response from the leads, and tracking of the campaign

4.1 Login

- 1 The User enters their credentials and logs into the application



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Screen: Launch the application

- 2 Once logged in, the User clicks on "Operations Office" to launch the application

Your current entity is Intellect Click on the below listed entitled applications to launch application.
Select an application to launch.

Web Applications

OperationsOffice PMX RevenueDesk

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Screen: Select Operations Office

4.2 Lead List Management

The first step in this journey is identifying the target audience for the campaign. This can be done in the following ways:

- a. Automatic Lead Generation
- b. Lead Upload
- c. Manual Lead Creation

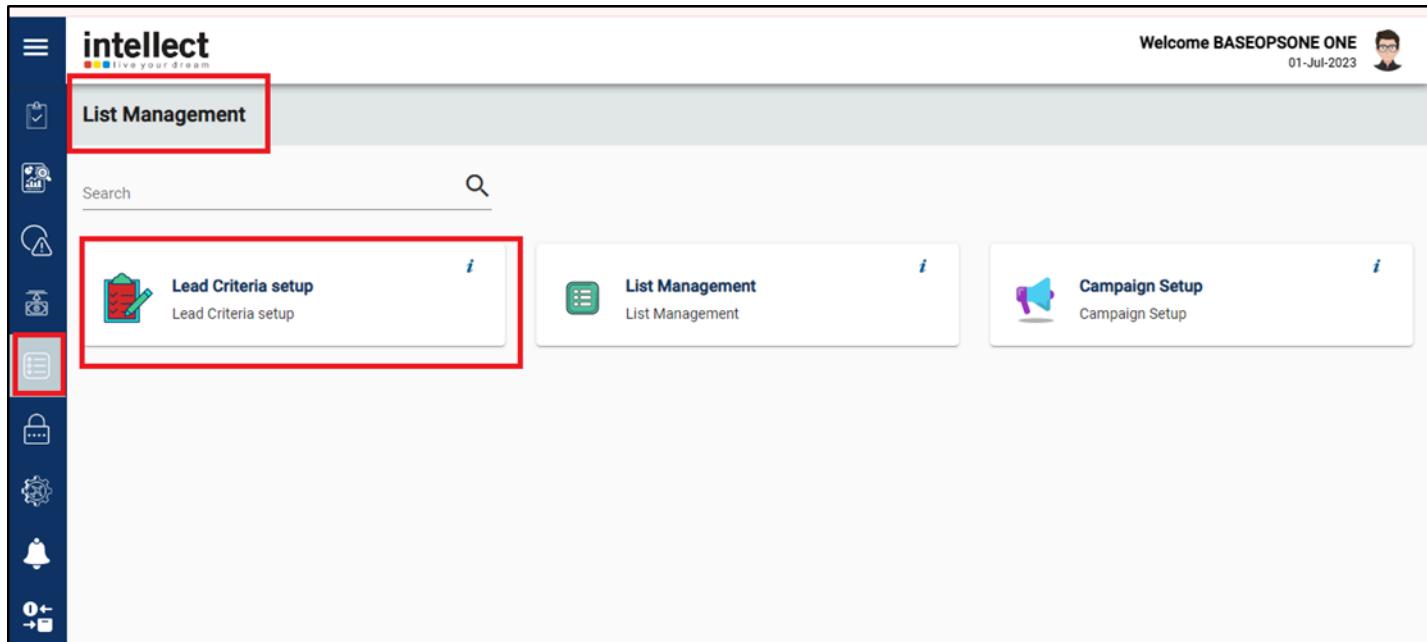
4.2.1 Automatic Lead Generation

The leads are identified automatically from the existing customers in the wealth system. The user defines the filter criteria in Rule Definition and as per the filter criteria defined; the system displays the filtered customer records

4.2.1.1 View All Lead Rules

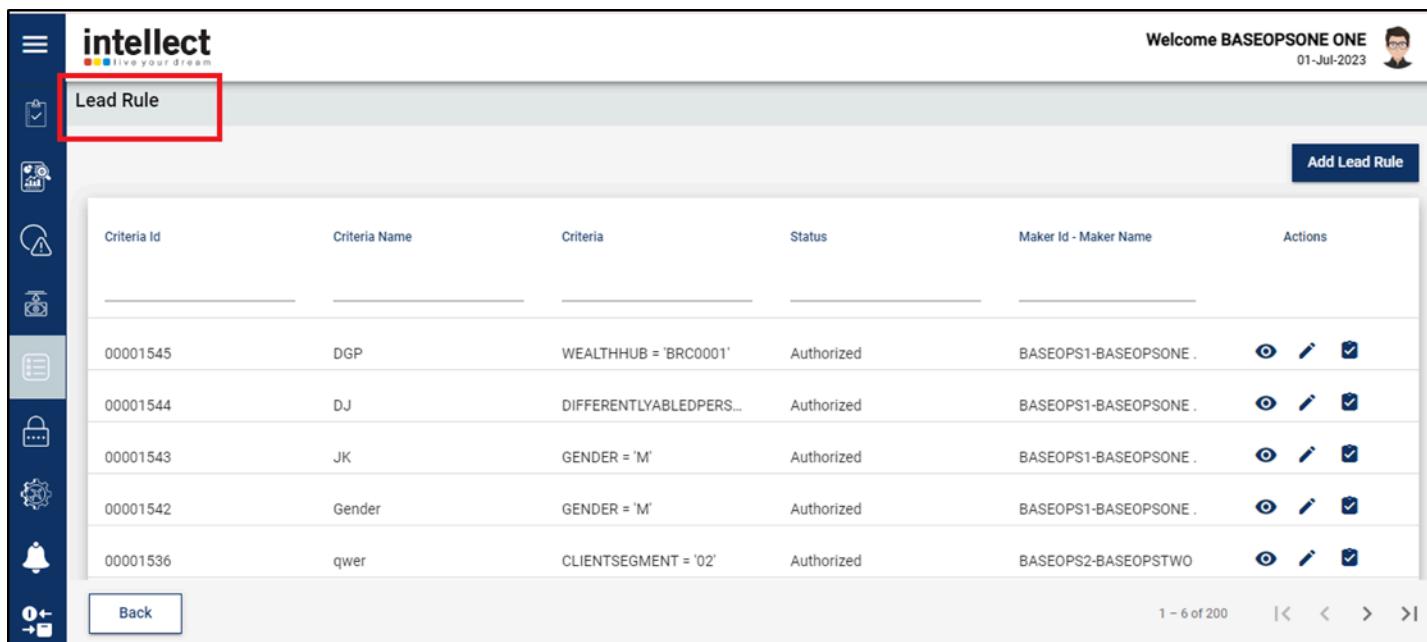
Lead Criteria setup is used to define the rule criteria as per which the existing customer records will be filtered to create a list of potential targets for a campaign. The user can view all the existing lead rules already created. The user can perform the following actions in Lead Rule:

1. Add Lead Rule
 2. Modify an existing Lead Rule
 3. View an existing Lead Rule
 4. Generate List
1. The user clicks on the “List Management” from the left sidebar menu and then clicks on the “Lead Criteria Setup” sub-menu.



Screen: Lead Rule Screen Navigation

2. User views the lead rules defined in the system



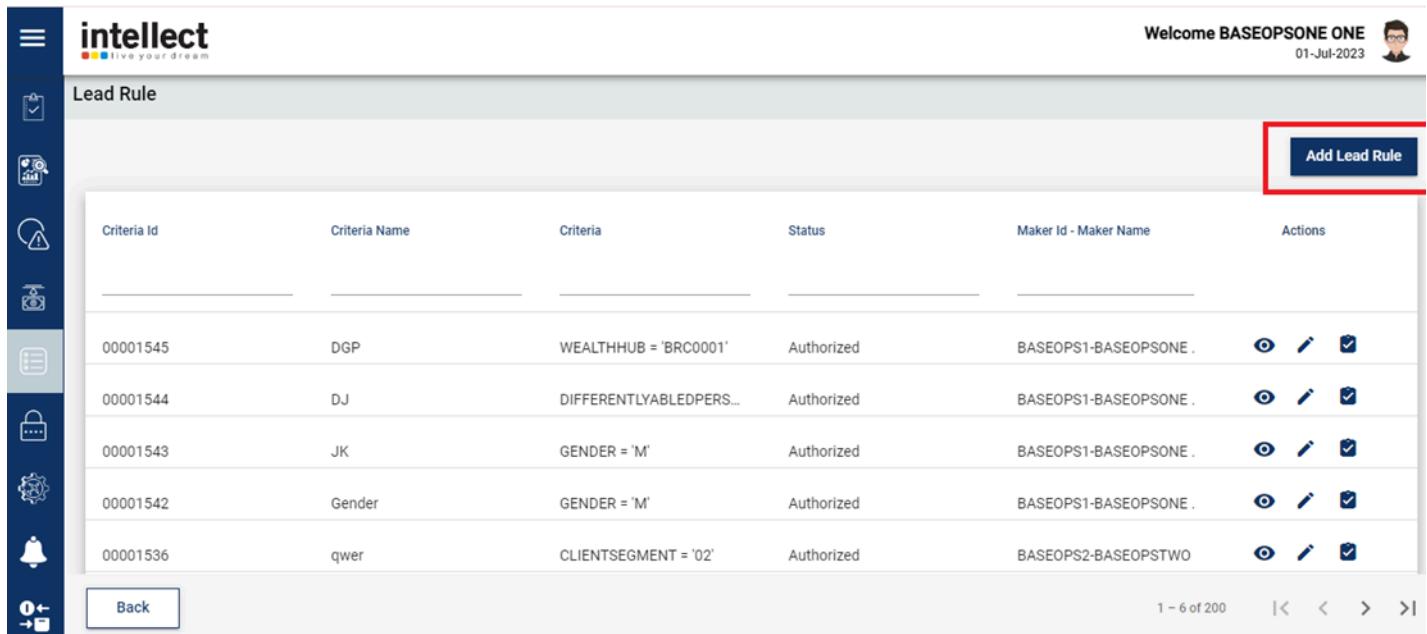
Criteria Id	Criteria Name	Criteria	Status	Maker Id - Maker Name	Actions
00001545	DGP	WEALTHHUB = 'BRC0001'	Authorized	BASEOPS1-BASEOPSONE .	
00001544	DJ	DIFFERENTLYABLEDPEERS...	Authorized	BASEOPS1-BASEOPSONE .	
00001543	JK	GENDER = 'M'	Authorized	BASEOPS1-BASEOPSONE .	
00001542	Gender	GENDER = 'M'	Authorized	BASEOPS1-BASEOPSONE .	
00001536	qwer	CLIENTSEGMENT = '02'	Authorized	BASEOPS2-BASEOPSTWO	

Screen: View All Lead Rules

4.2.1.2 Add Lead Rule

Add Lead Rule is used to add a new rule criteria based on which the existing customer records will be filtered to create a list of potential targets for a campaign

- The user clicks on "Add" to add a new lead rule



This screenshot shows the 'Lead Rule' screen in the intellect platform. On the left is a vertical toolbar with various icons. At the top right, it says 'Welcome BASEOPSONE ONE' and '01-Jul-2023'. A red box highlights the 'Add Lead Rule' button in the top right corner of the main content area. Below the button is a table with columns: Criteria Id, Criteria Name, Criteria, Status, Maker Id - Maker Name, and Actions. The table contains five rows of data. At the bottom left is a 'Back' button, and at the bottom right are navigation links for page 1-6 of 200.

Criteria Id	Criteria Name	Criteria	Status	Maker Id - Maker Name	Actions
00001545	DGP	WEALTHHUB = 'BRC0001'	Authorized	BASEOPS1-BASEOPSONE .	
00001544	DJ	DIFFERENTLYABLEDPERS...	Authorized	BASEOPS1-BASEOPSONE .	
00001543	JK	GENDER = 'M'	Authorized	BASEOPS1-BASEOPSONE .	
00001542	Gender	GENDER = 'M'	Authorized	BASEOPS1-BASEOPSONE .	
00001536	qwer	CLIENTSEGMENT = '02'	Authorized	BASEOPS2-BASEOPSTWO	

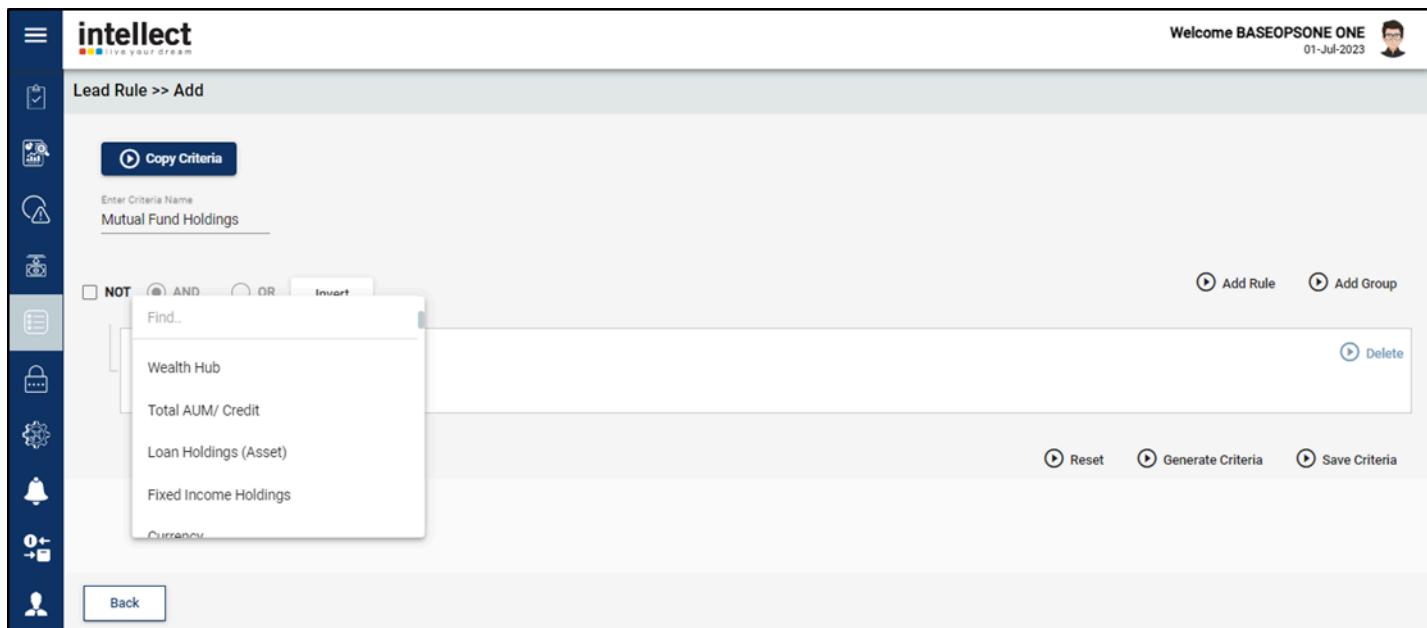
Screen: Define Lead Rule Screen Navigation

- The user inputs the "Criteria Name" and views the list of criteria for lead rule definition



This screenshot shows the 'Define Lead Rule >> Add' screen. It features a 'Copy Criteria' button and a text input field for 'Enter Criteria Name' containing 'Mutual Fund Holdings'. Below the input are radio buttons for 'NOT', 'AND', and 'OR', with 'AND' selected. An 'Invert' button is also present. To the right are buttons for 'Add Rule', 'Add Group', 'Reset', 'Generate Criteria', and 'Save Criteria'. At the bottom left is a 'Back' button.

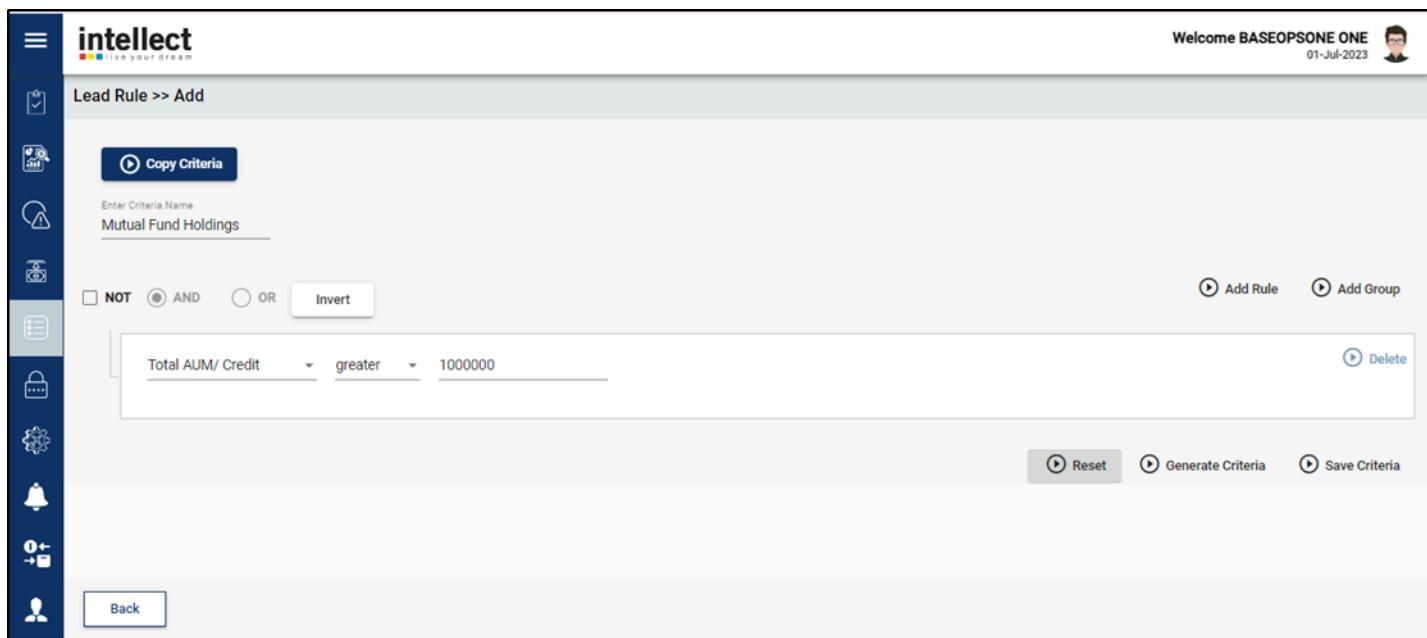
Screen: Define Lead Rule- Enter Criteria Name



The screenshot shows the 'Lead Rule >> Add' interface. At the top, there's a 'Copy Criteria' button and a text input field for 'Enter Criteria Name' containing 'Mutual Fund Holdings'. Below this is a dropdown menu with options: NOT, AND, OR, and Insert. The 'Insert' option is selected. A sub-menu is open, listing 'Wealth Hub', 'Total AUM/ Credit', 'Loan Holdings (Asset)', 'Fixed Income Holdings', and 'Currency'. On the right side of the screen, there are buttons for 'Add Rule', 'Add Group', 'Reset', 'Generate Criteria', and 'Save Criteria'. A 'Back' button is located at the bottom left.

Screen: Define Lead Rule - View List of Criteria

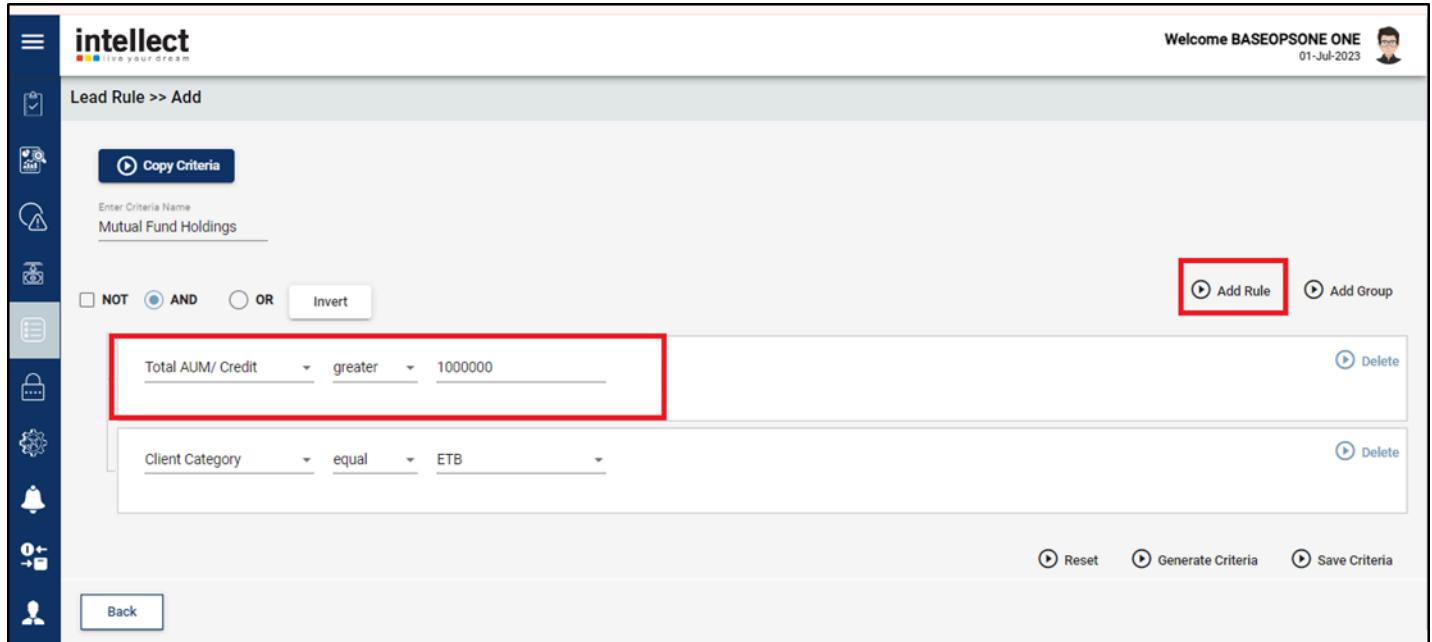
3. They then select the criteria from the dropdown list, the mathematical operation, and the criteria value. In the below example (Criteria - Total AUM/Credit, Mathematical Operation - Greater, Criteria Value - 10,00,000)



This screenshot shows the same 'Lead Rule >> Add' interface as the previous one, but with a different selection in the dropdown menu. The 'Insert' option is now selected, and a single criterion entry is visible: 'Total AUM/ Credit' with the operator 'greater' and the value '1000000'. The other options in the dropdown menu ('NOT', 'AND', 'OR') are still available.

Screen: Lead Rule Criteria

- a. Users can add rules to the existing rule present by clicking on the "Add Rule". The below example has two criteria:
 - i. Client Category is equal to ETB (Existing to Bank)
 - ii. Total AUM/Credit greater than 10,00,000 INR



Lead Rule >> Add

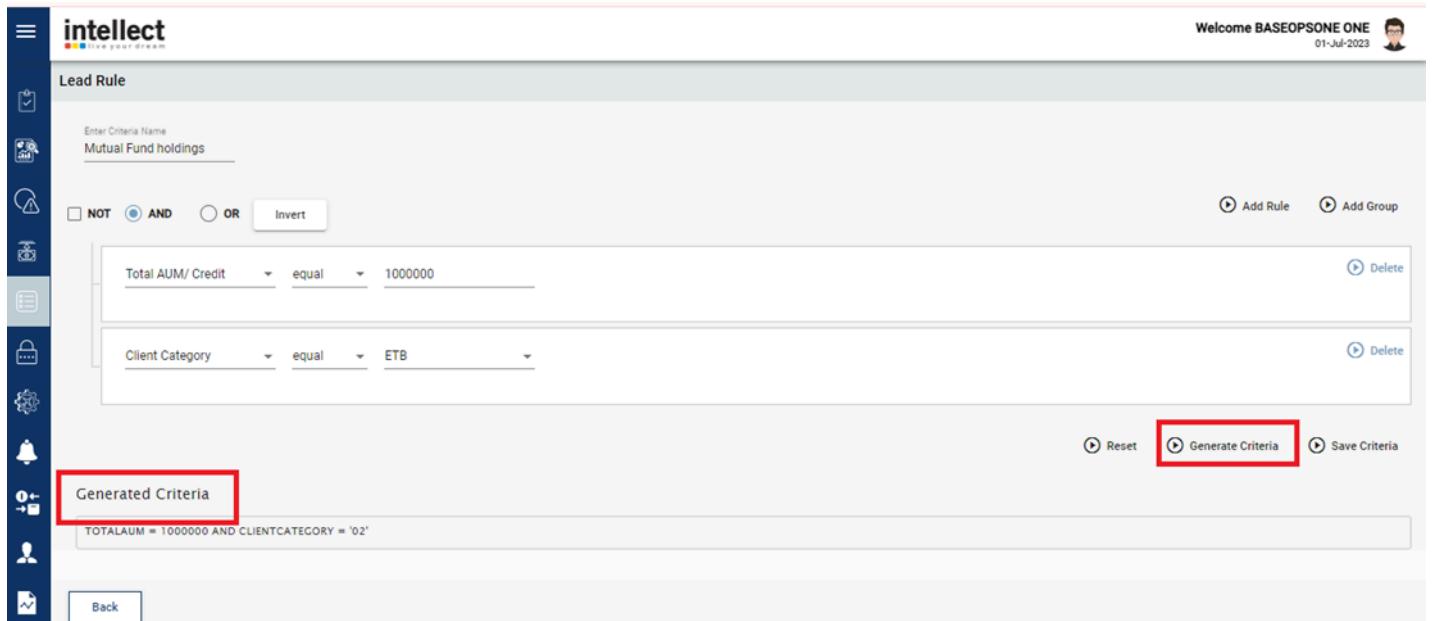
Enter Criteria Name
Mutual Fund Holdings

NOT AND OR

Total AUM/ Credit	greater	1000000	<input type="button" value="Delete"/>
Client Category	equal	ETB	<input type="button" value="Delete"/>

Screen: Lead Rule Criteria

- b. Users can join the single criteria with a Logical Operator (AND, OR). The below example has two single criteria joined with the “AND” logical operator. Users can view the rule criteria by clicking on “Generate Criteria”
 - i. Client Category is equal to ETB (AND) Total AUM/Credit greater than 10,00,000 INR



Lead Rule

Enter Criteria Name
Mutual Fund holdings

NOT AND OR

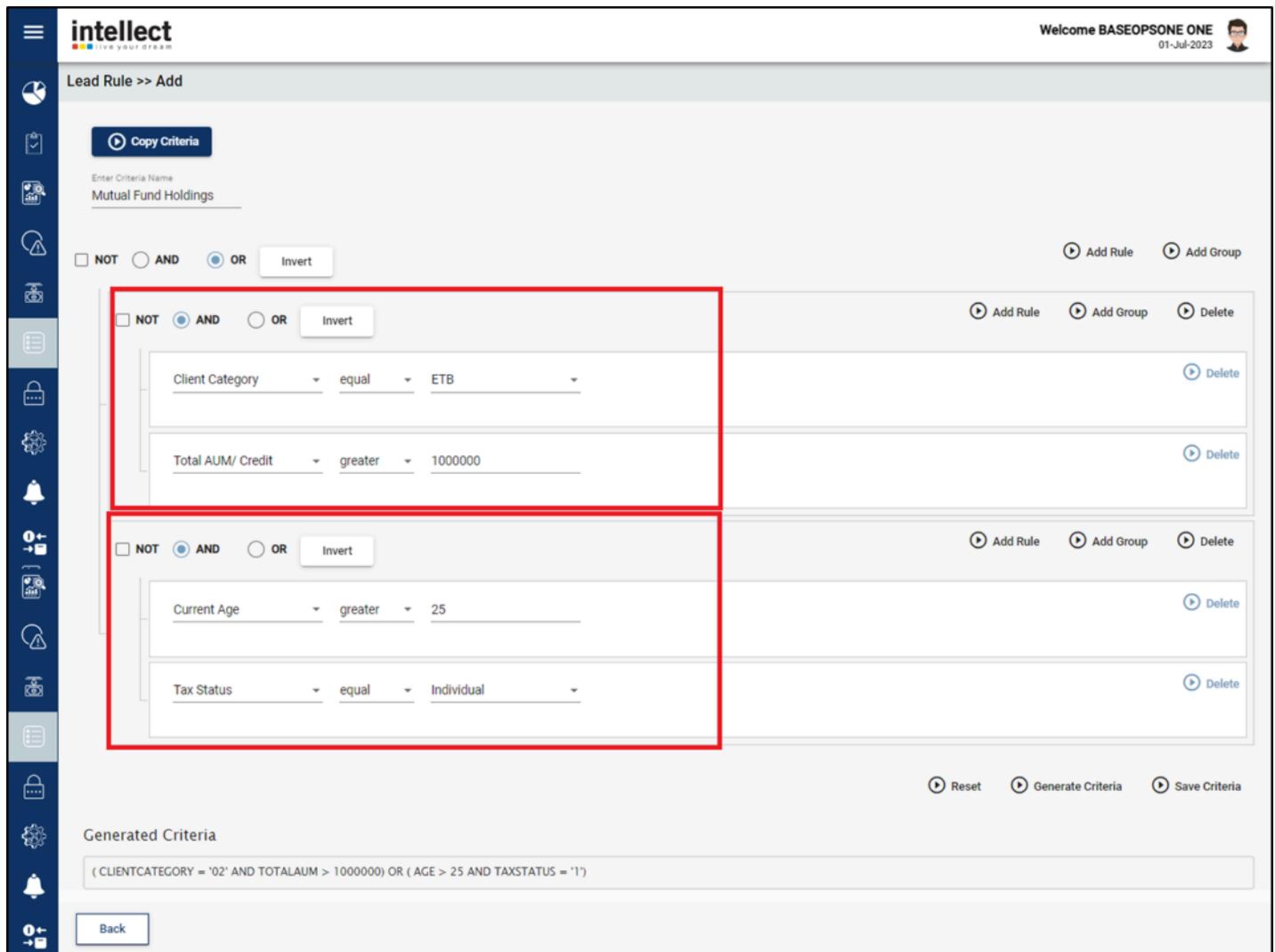
Total AUM/ Credit	equal	1000000	<input type="button" value="Delete"/>
Client Category	equal	ETB	<input type="button" value="Delete"/>

Generated Criteria

```
TOTALAUM = 1000000 AND CLIENTCATEGORY = '02'
```

Screen: Generate Criteria

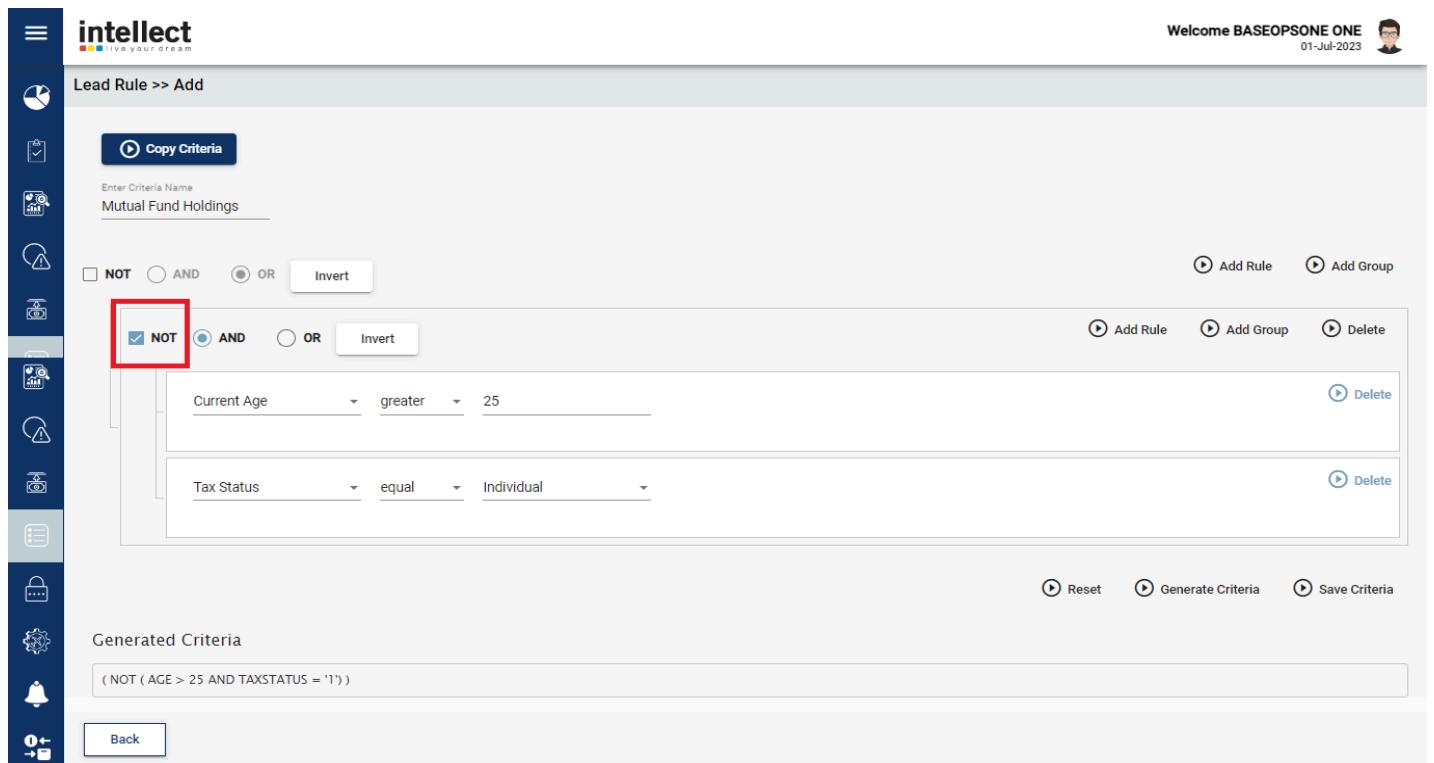
- c. Users can join the multiple criteria with Logical Operator (AND, OR) by clicking on “Add Group”. The below example has two - criteria joined with the “OR” logical operator
- (Client Category is equal to ETB (AND) Total AUM/Credit greater than 10,00,000 INR) **OR** (Age greater than 25 (AND) Tax Status is equal to Individual)



The screenshot shows the Intellect Lead Rule Criteria interface. On the left is a vertical sidebar with various icons. The main area is titled "Lead Rule >> Add". It shows a "Copy Criteria" button and a text input field with the placeholder "Enter Criteria Name: Mutual Fund Holdings". Below this is a logical operator selector with "NOT", "AND", and "OR" options, currently set to "OR". There are "Invert" and "Add Rule" buttons. The main content area displays two groups of criteria, each enclosed in a red box. The first group contains "Client Category" set to "equal" "ETB" and "Total AUM/ Credit" set to "greater" "1000000". The second group contains "Current Age" set to "greater" "25" and "Tax Status" set to "equal" "Individual". At the bottom, there are "Reset", "Generate Criteria", and "Save Criteria" buttons, along with a "Generated Criteria" section containing the generated SQL-like query: "(CLIENTCATEGORY = '02' AND TOTALAUM > 1000000) OR (AGE > 25 AND TAXSTATUS = '1')". A "Back" button is at the bottom left.

Screen: Lead Rule Criteria

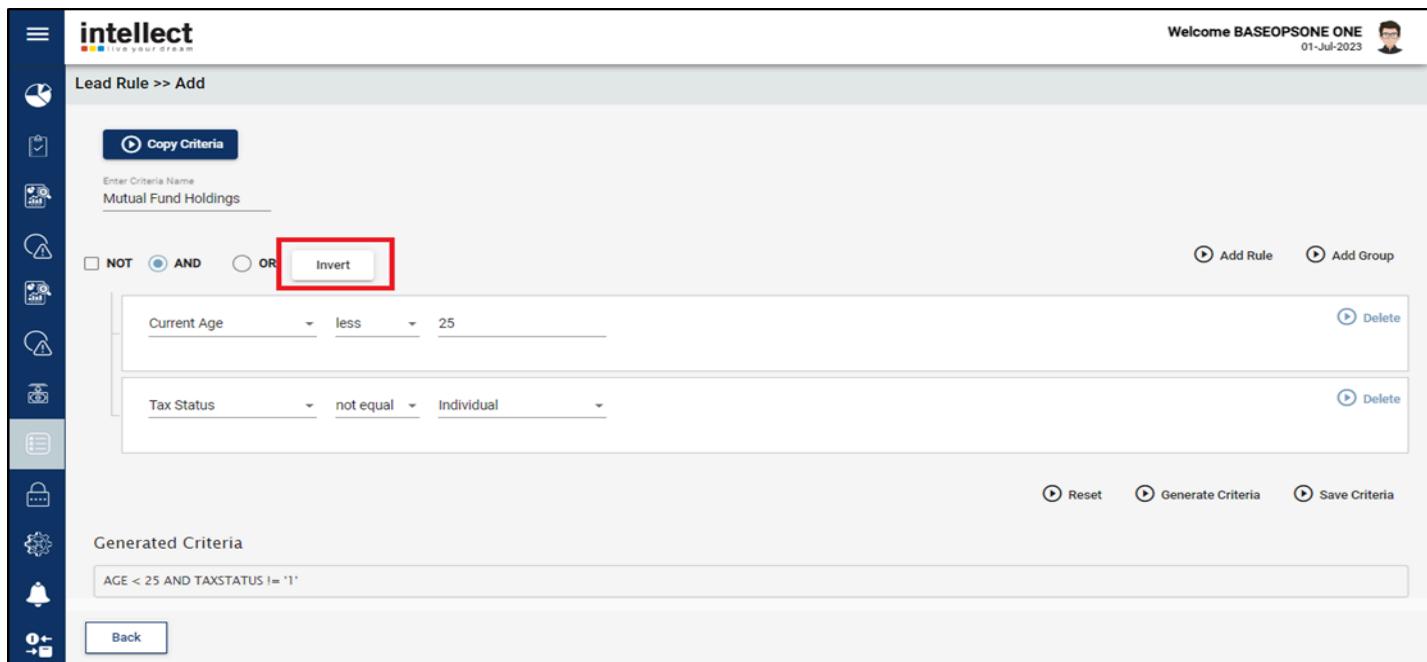
- d. Users can create criteria to exclude the customers satisfying the criteria by using the NOT function. The below example excludes married customers who have an Age greater than 25
- NOT (Age greater than 25 (AND) Tax Status is Individual)



The screenshot shows the 'Lead Rule >> Add' screen. A red box highlights the 'NOT' button in the operator selection area. The generated criteria is displayed as: (NOT (AGE > 25 AND TAXSTATUS = '1')).

Screen: Lead Rule Criteria

- e. Users can inverse the mathematical operators used for the criteria by clicking on "Invert". The below example can be inverted
 - i. (Age greater than 25 (AND) Tax Status is Individual) is inverted to (Age less than or equal to 25 (AND) Tax Status is not Individual)



Lead Rule >> Add

Enter Criteria Name: Mutual Fund Holdings

NOT AND OR

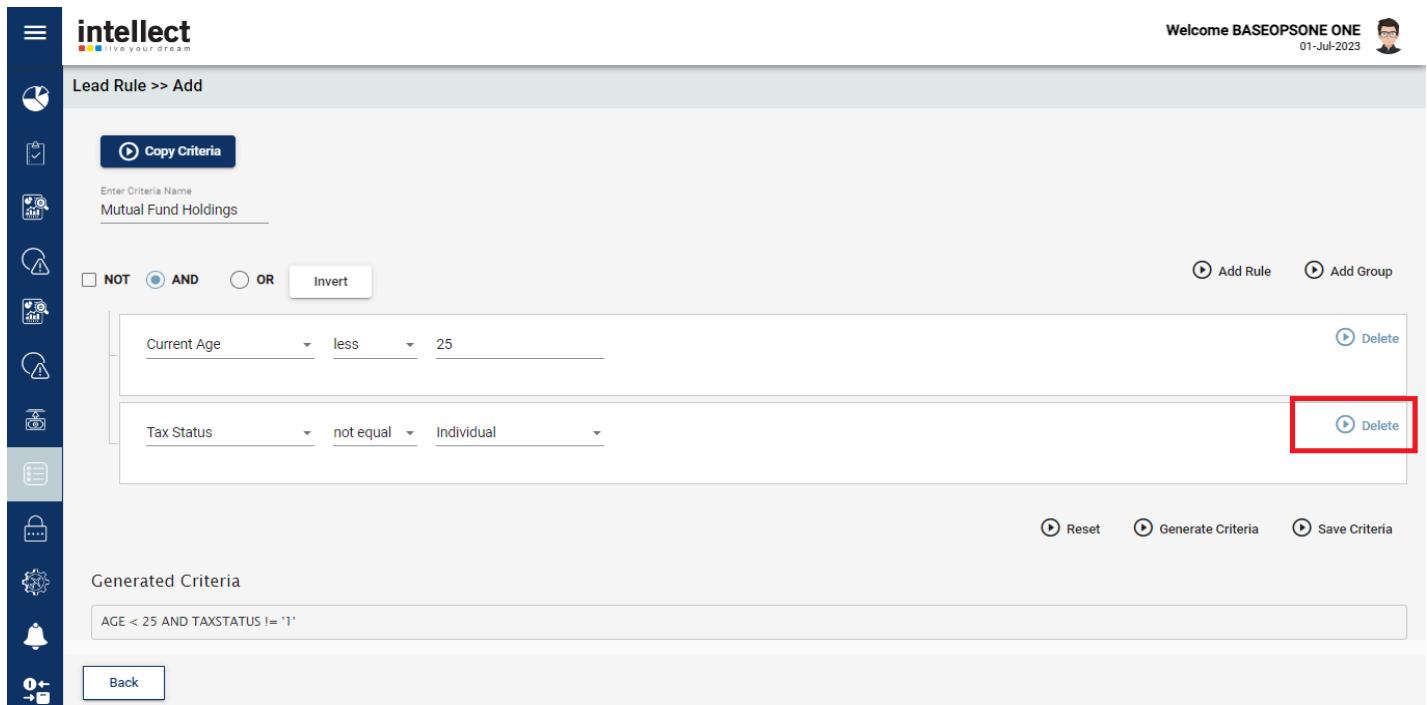
Current Age less 25

Tax Status not equal Individual

Generated Criteria: AGE < 25 AND TAXSTATUS != '1'

Screen: Invert Lead Rule Criteria

- f. Users can delete the criteria by clicking on “Delete”. In the below example, tax status criteria can be deleted
 - i. (Age less than equal to 25 (AND) Tax Status is Individual) to (Age less than or equal to 25)



Lead Rule >> Add

Enter Criteria Name: Mutual Fund Holdings

NOT AND OR

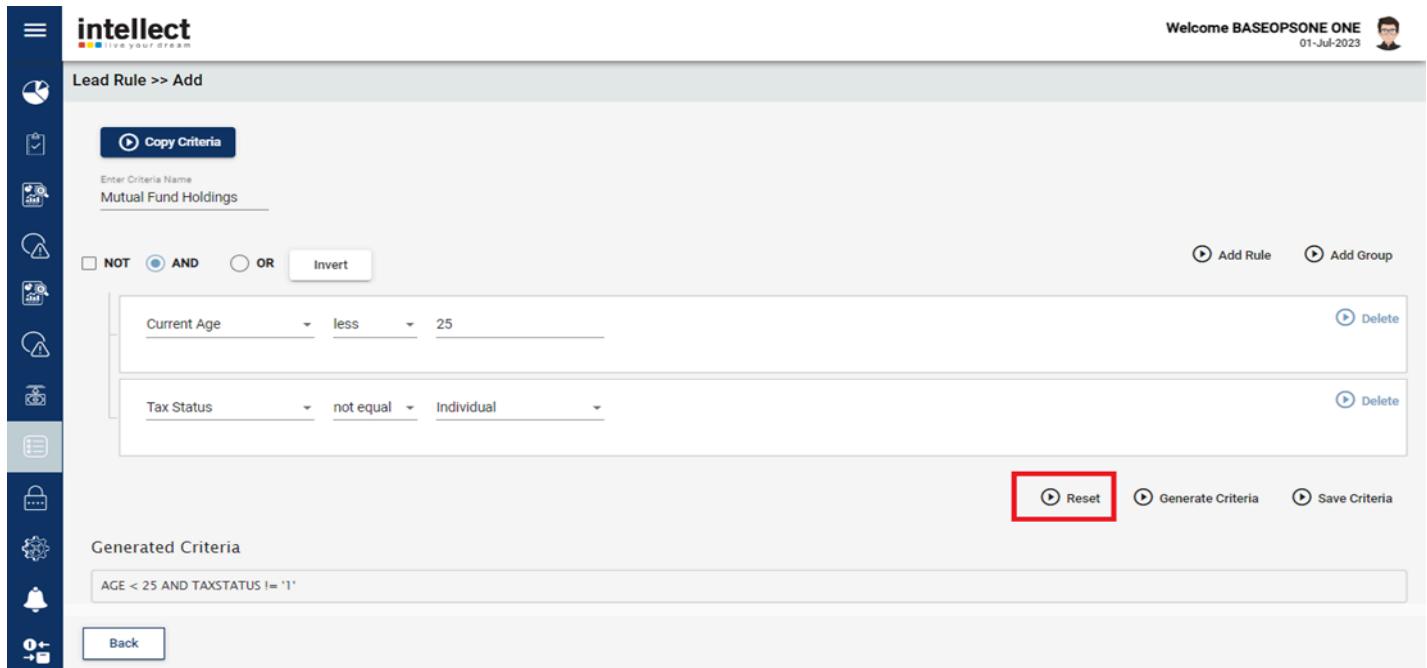
Current Age less 25

Tax Status not equal Individual

Generated Criteria: AGE < 25 AND TAXSTATUS != '1'

Screen: Delete Lead Rule Criteria

- g. Users can reset the entire criteria by clicking on the “Reset”



Welcome BASEOPS ONE
01-Jul-2023

Lead Rule >> Add

Enter Criteria Name
Mutual Fund Holdings

NOT AND OR

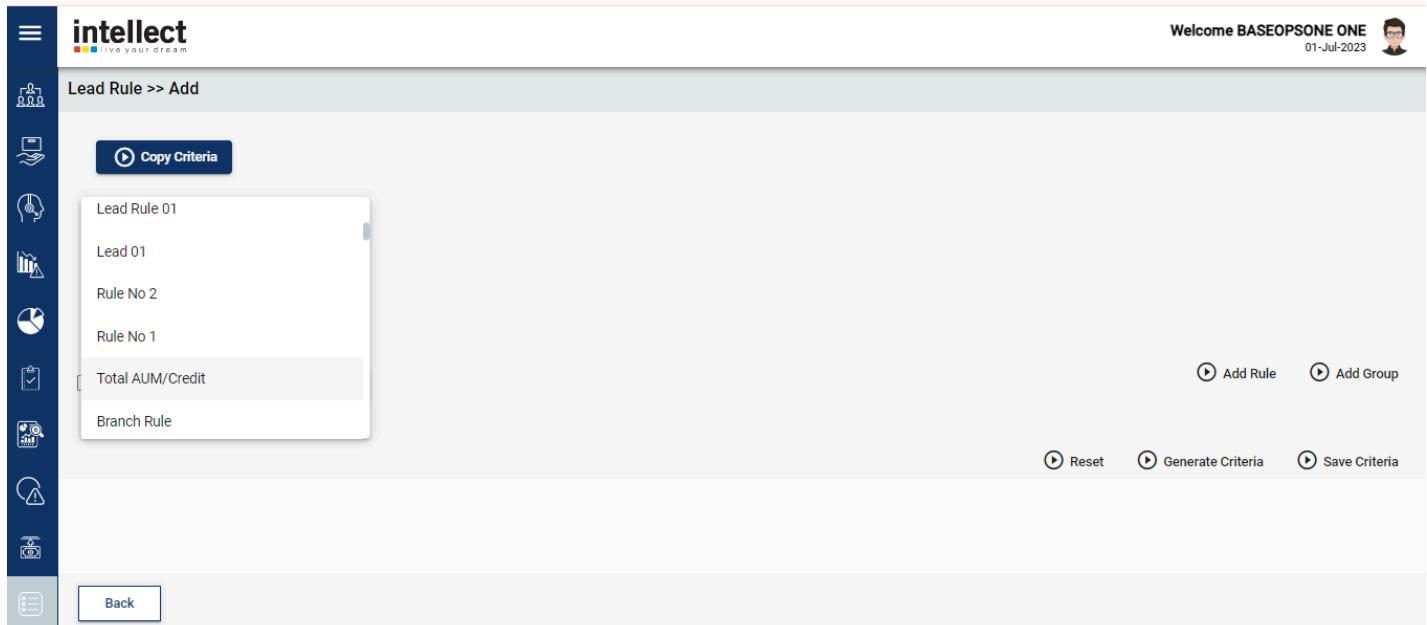
Current Age less 25

Tax Status not equal Individual

Generated Criteria
AGE < 25 AND TAXSTATUS != '1'

Screen: Reset Criteria

- h. Users can copy existing lead rule criteria already defined by clicking on “Copy Criteria” and selecting the criteria from the dropdown list. The selected criteria can be modified by the user



Welcome BASEOPS ONE
01-Jul-2023

Lead Rule >> Add

Lead Rule 01
Lead 01
Rule No 2
Rule No 1
Total AUM/Credit
Branch Rule

Screen: Copy Criteria

- i. The user creates the criteria using the above-mentioned steps and clicks on “Save Criteria” to save the lead rule

intellect

Welcome BASEOPSONE ONE
01-Jul-2023

Lead Rule

Add Lead Rule

Criteria Id	Criteria Name	Criteria	Status	Maker Id - Maker Name	Authorizer Id - Auth	Actions		
00001546	Mutual Fund holdings	AGE > 25 AND TAXSTATUS...	Authorized	BASEOPS1-BASEOPSONE ...	-			
00001545	DGP	WEALTHHUB = 'BRC0001'	Authorized	BASEOPS1-BASEOPSONE ...	-			
00001544	DJ	DIFFERENTLYABLEDPER...	Authorized	BASEOPS1-BASEOPSONE ...	-			
00001543	JK	GENDER = 'M'	Authorized	BASEOPS1-BASEOPSONE ...	-			
00001542	Gender	GENDER = 'M'	Authorized	BASEOPS1-BASEOPSONE ...	-			
00001536	qwer	CLIENTSEGMENT = '02'	Authorized	BASEOPS2-BASEOPSTWO ...	-			

Record Saved Successfully Ok

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Screen: Save Lead Rule Criteria

- j. Users can view the lead rule record saved in the Lead Rule screen

intellect

Welcome BASEOPSONE ONE
01-Jul-2023

Lead Rule

Add Lead Rule

Criteria Id	Criteria Name	Criteria	Status	Maker Id - Maker Name	Authorizer Id - Auth	Actions		
00001546	Mutual Fund holdings	AGE > 25 AND TAXSTATUS...	Authorized	BASEOPS1-BASEOPSONE ...	-			
00001545	DGP	WEALTHHUB = 'BRC0001'	Authorized	BASEOPS1-BASEOPSONE ...	-			
00001544	DJ	DIFFERENTLYABLEDPER...	Authorized	BASEOPS1-BASEOPSONE ...	-			
00001543	JK	GENDER = 'M'	Authorized	BASEOPS1-BASEOPSONE ...	-			
00001542	Gender	GENDER = 'M'	Authorized	BASEOPS1-BASEOPSONE ...	-			
00001536	qwer	CLIENTSEGMENT = '02'	Authorized	BASEOPS2-BASEOPSTWO ...	-			

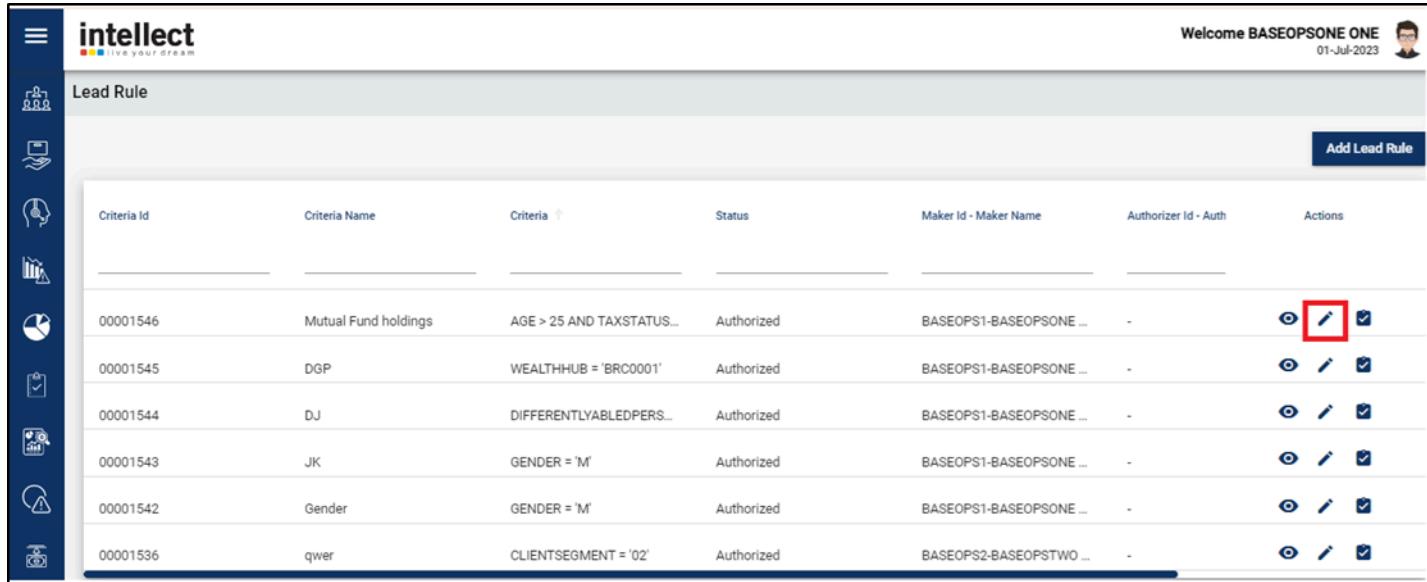
Back 1 - 6 of 200 | < < > >|

Screen: View Lead Rule Criteria Record

4.2.1.3 Modify Lead Rule

The Lead Rule criteria added can be modified and saved

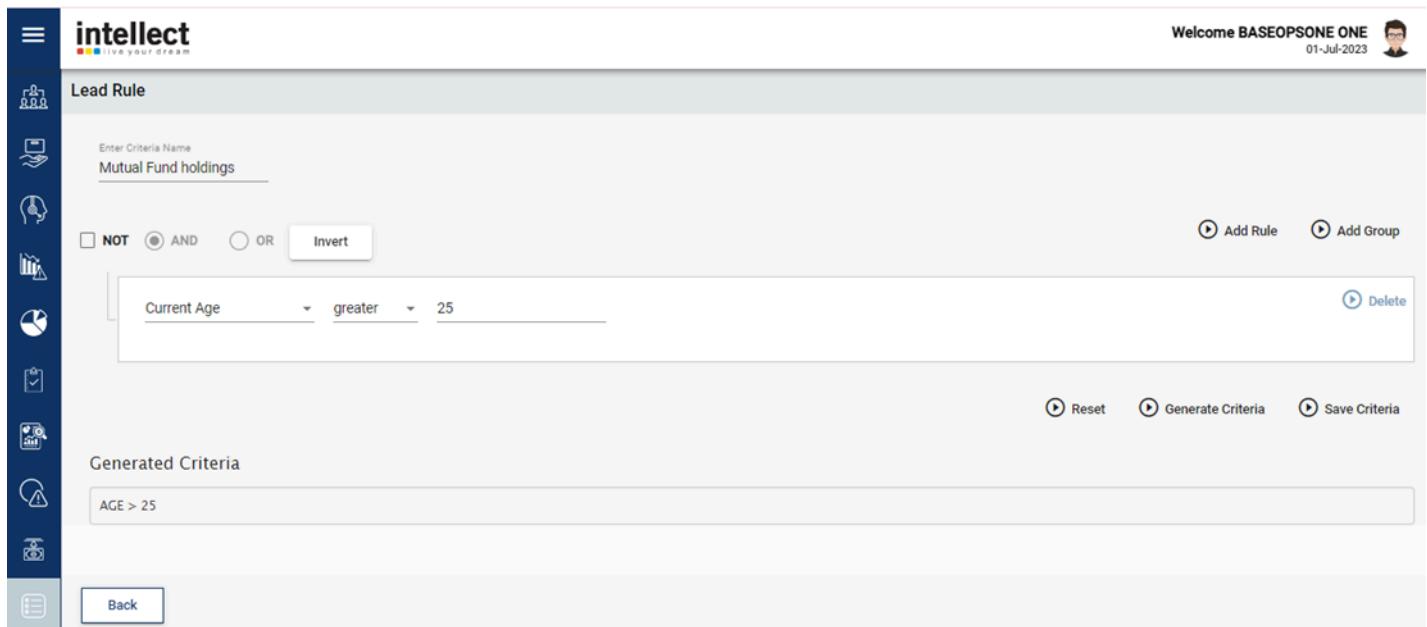
1. The user selects the criteria record and clicks on the “Modify” button to modify a lead rule



Criteria Id	Criteria Name	Criteria	Status	Maker Id - Maker Name	Authorizer Id - Auth	Actions
00001546	Mutual Fund holdings	AGE > 25 AND TAXSTATUS...	Authorized	BASEOPS1-BASEOPSONE ...	-	
00001545	DGP	WEALTHHUB = 'BRC0001'	Authorized	BASEOPS1-BASEOPSONE ...	-	
00001544	DJ	DIFFERENTLYABLEDPERS...	Authorized	BASEOPS1-BASEOPSONE ...	-	
00001543	JK	GENDER = 'M'	Authorized	BASEOPS1-BASEOPSONE ...	-	
00001542	Gender	GENDER = 'M'	Authorized	BASEOPS1-BASEOPSONE ...	-	
00001536	qwer	CLIENTSEGMENT = '02'	Authorized	BASEOPS2-BASEOPSTWO ...	-	

Screen: Select Lead Rule Criteria Record for Modification

2. User modifies the criteria



Enter Criteria Name
Mutual Fund holdings

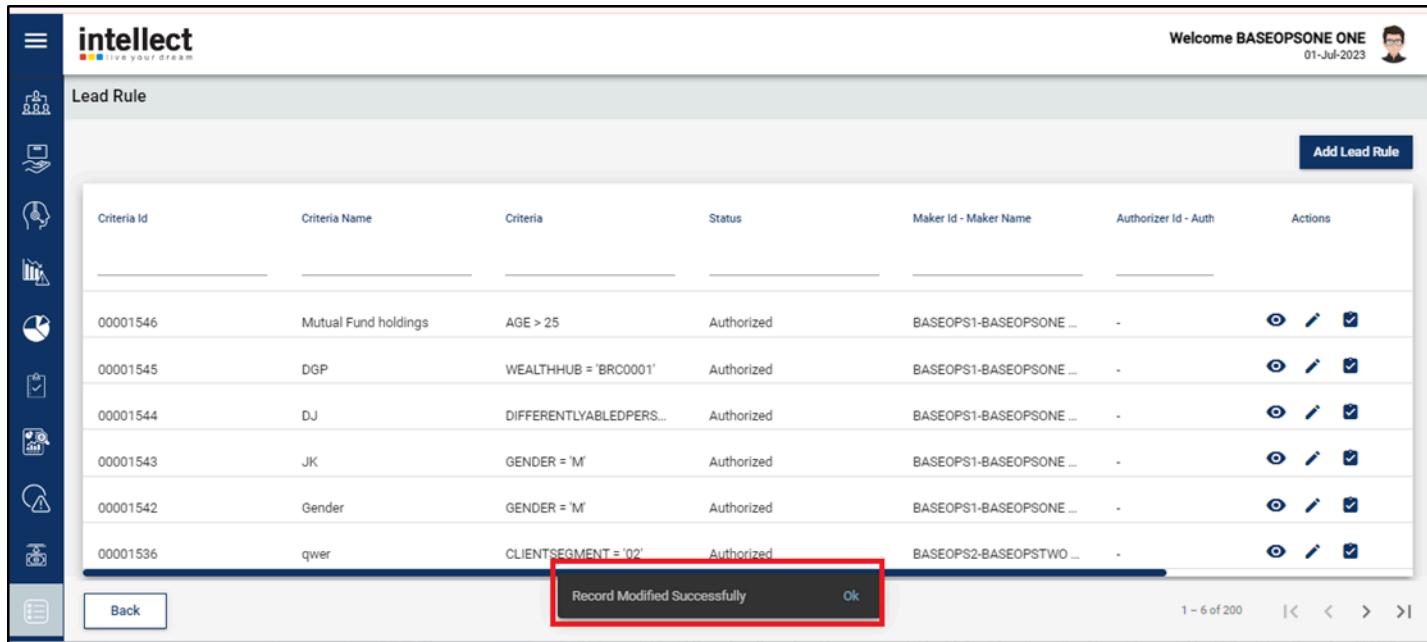
NOT AND OR

Current Age	greater	25	<input type="button" value="Delete"/>
-------------	---------	----	---------------------------------------

Generated Criteria
AGE > 25

Screen: Modify Lead Rule Criteria

3. The user clicks on the “Save Criteria” button to save the modified lead rule



The screenshot shows a software application window titled "Lead Rule". The top right corner displays a welcome message "Welcome BASEOPSONE ONE" and the date "01-Jul-2023". On the left side, there is a vertical sidebar with various icons. The main area contains a table with columns: Criteria Id, Criteria Name, Criteria, Status, Maker Id - Maker Name, Authorizer Id - Auth, and Actions. There are six rows of data in the table. At the bottom of the screen, there is a message box with the text "Record Modified Successfully" and an "Ok" button. The entire message box is highlighted with a red border.

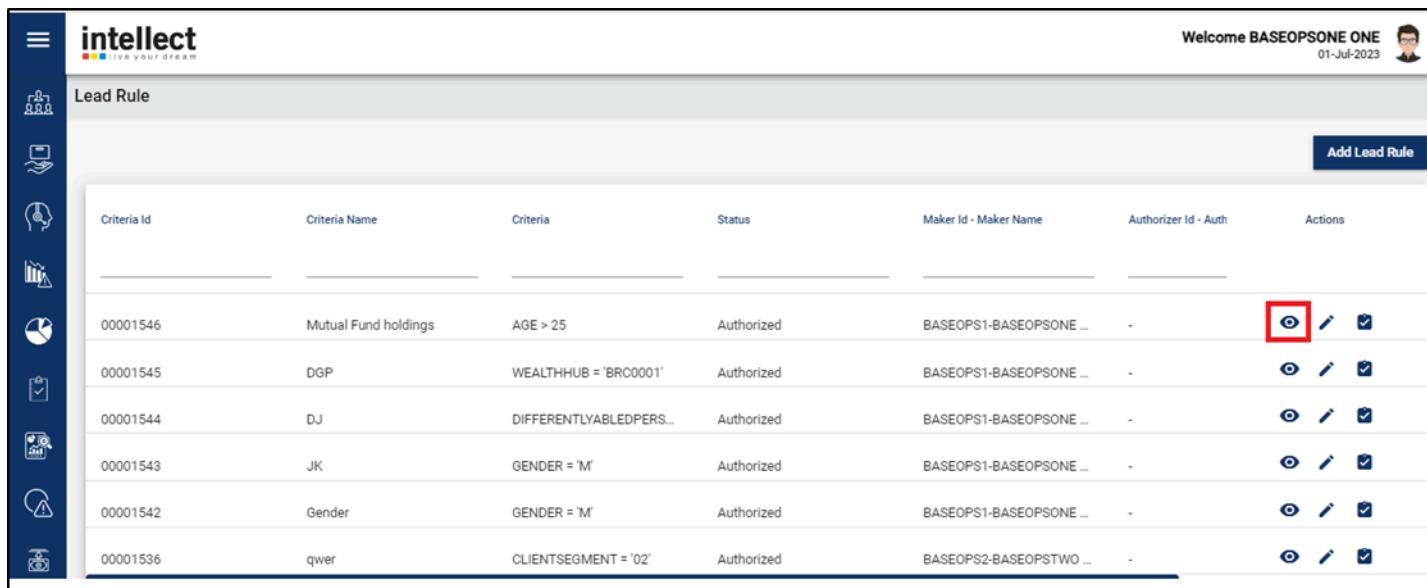
Criteria Id	Criteria Name	Criteria	Status	Maker Id - Maker Name	Authorizer Id - Auth	Actions
00001546	Mutual Fund holdings	AGE > 25	Authorized	BASEOPS1-BASEOPSONE ...	-	
00001545	DGP	WEALTHHUB = 'BRC0001'	Authorized	BASEOPS1-BASEOPSONE ...	-	
00001544	DJ	DIFFERENTLYABLEDPERS...	Authorized	BASEOPS1-BASEOPSONE ...	-	
00001543	JK	GENDER = 'M'	Authorized	BASEOPS1-BASEOPSONE ...	-	
00001542	Gender	GENDER = 'M'	Authorized	BASEOPS1-BASEOPSONE ...	-	
00001536	qwer	CLIENTSEGMENT = '02'	Authorized	BASEOPS2-BASEOPSTWO ...	-	

Screen: Criteria Modified Successfully

4.2.1.4 View Lead Rule

The Lead Rule criteria can be viewed

1. The user selects the criteria record and clicks on the “View” button to view a lead rule

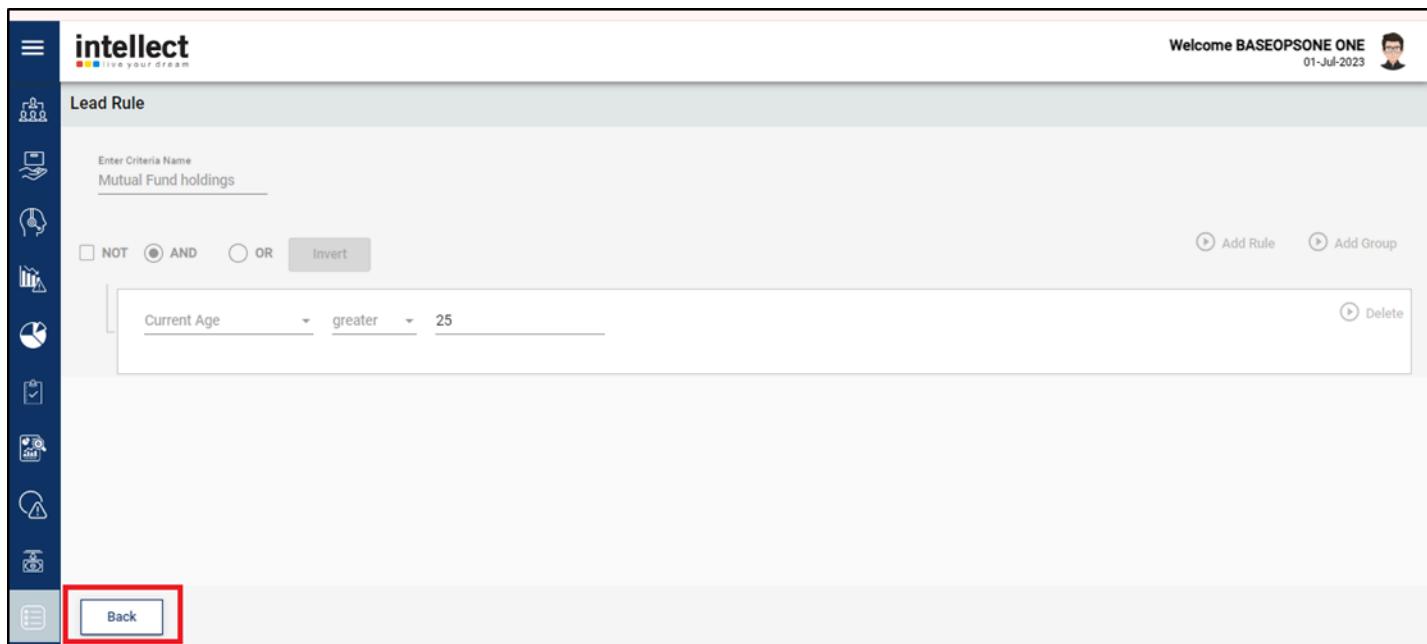


The screenshot shows a table titled "Lead Rule" with columns: Criteria Id, Criteria Name, Criteria, Status, Maker Id - Maker Name, Authorizer Id - Auth, and Actions. There are six rows of data. The "Actions" column for each row contains three icons: a magnifying glass, a pencil, and a checkmark. The last icon in the first row's "Actions" column is highlighted with a red box.

Criteria Id	Criteria Name	Criteria	Status	Maker Id - Maker Name	Authorizer Id - Auth	Actions
00001546	Mutual Fund holdings	AGE > 25	Authorized	BASEOPS1-BASEOPSONE ...	-	
00001545	DGP	WEALTHHUB = 'BRC0001'	Authorized	BASEOPS1-BASEOPSONE ...	-	
00001544	DJ	DIFFERENTLYABLEDPERSONS...	Authorized	BASEOPS1-BASEOPSONE ...	-	
00001543	JK	GENDER = 'M'	Authorized	BASEOPS1-BASEOPSONE ...	-	
00001542	Gender	GENDER = 'M'	Authorized	BASEOPS1-BASEOPSONE ...	-	
00001536	qwer	CLIENTSEGMENT = '02'	Authorized	BASEOPS2-BASEOPSTWO ...	-	

Screen: Select Lead Rule Criteria Record for View

- User views the criteria and clicks on the Back button to return to the “View All Lead Rules” screen



The screenshot shows the "Lead Rule" screen with a search bar containing "Mutual Fund holdings". Below it are filter buttons for NOT, AND, OR, and an "Invert" button. A criteria entry field shows "Current Age greater 25". At the bottom left, there is a "Back" button, which is highlighted with a red box.

Screen: View Lead Rule Criteria

4.2.1.5 Generate List

The list of customers satisfying the lead rule criteria can be generated using “Generate List”

- User selects the criteria record and clicks on the “Generate List” button to generate the list

Lead Rule

Welcome BASEOPSONE ONE
01-Jul-2023

Add Lead Rule

Criteria Id	Criteria Name	Criteria	Status	Maker Id - Maker Name	Authorizer Id - Auth	Actions
00001546	Mutual Fund holdings	AGE > 25	Authorized	BASEOPS1-BASEOPSONE ...	-	
00001545	DGP	WEALTHHUB = 'BRC0001'	Authorized	BASEOPS1-BASEOPSONE ...	-	
00001544	DJ	DIFFERENTLYABLEDPERSONS...	Authorized	BASEOPS1-BASEOPSONE ...	-	
00001543	JK	GENDER = 'M'	Authorized	BASEOPS1-BASEOPSONE ...	-	
00001542	Gender	GENDER = 'M'	Authorized	BASEOPS1-BASEOPSONE ...	-	
00001536	qwer	CLIENTSEGMENT = '02'	Authorized	BASEOPS2-BASEOPSTWO ...	-	

Back

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Screen: Generate Lead List for Lead Rule

2. Users can view the list in the List Management screen (refer to section List Management)

Lead Rule

Welcome BASEOPSONE ONE
01-Jul-2023

Add Lead Rule

Criteria Id	Criteria Name	Criteria	Status	Maker Id - Maker Name	Authorizer Id - Auth	Actions
00001546	Mutual Fund holdings	AGE > 25	Authorized	BASEOPS1-BASEOPSONE ...	-	
00001545	DGP	WEALTHHUB = 'BRC0001'	Authorized	BASEOPS1-BASEOPSONE ...	-	
00001544	DJ	DIFFERENTLYABLEDPERSONS...	Authorized	BASEOPS1-BASEOPSONE ...	-	
00001543	JK	GENDER = 'M'	Authorized	BASEOPS1-BASEOPSONE ...	-	
00001542	Gender	GENDER = 'M'	Authorized	BASEOPS1-BASEOPSONE ...	-	
00001536	qwer	CLIENTSEGMENT = '02'	Authorized	BASEOPS2-BASEOPSTWO ...	-	

LIST2068-List Generated Successfully

Back

1 – 6 of 200 | < < > >|

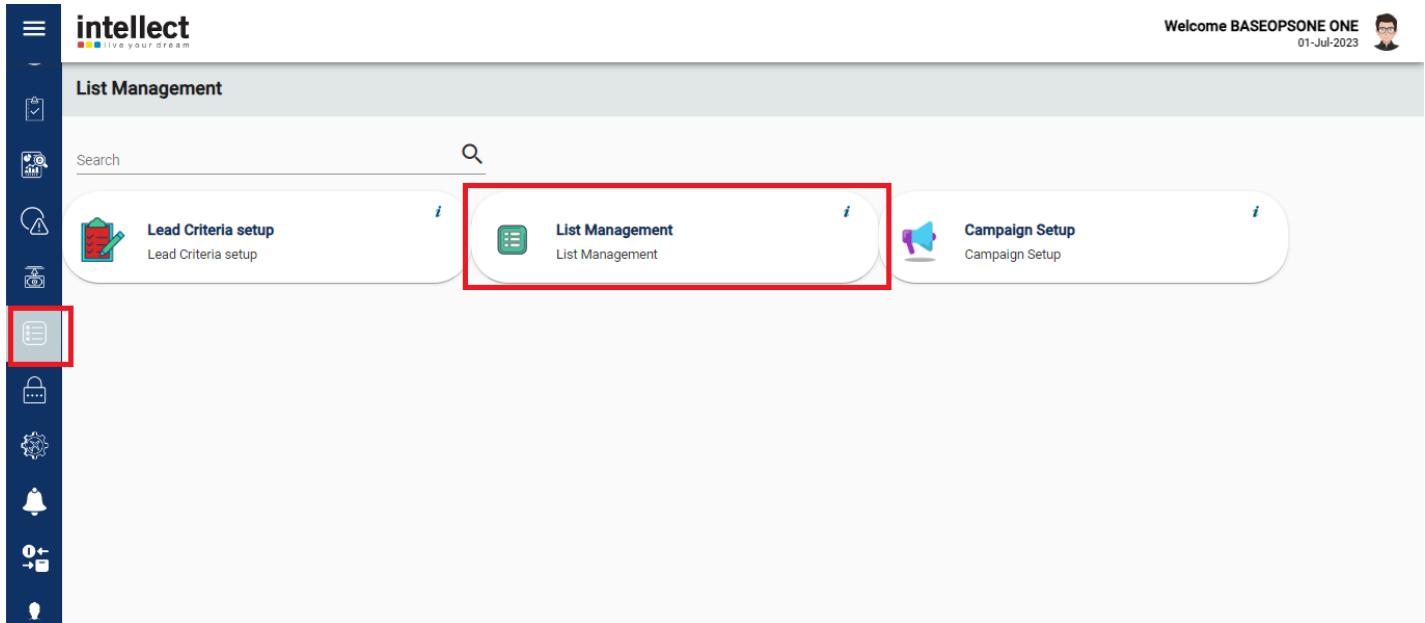
Screen: Generate Lead List for Lead Rule

4.2.2 Lead Upload

The user can upload a list from third-party systems (refer to Annexure for Upload Template)

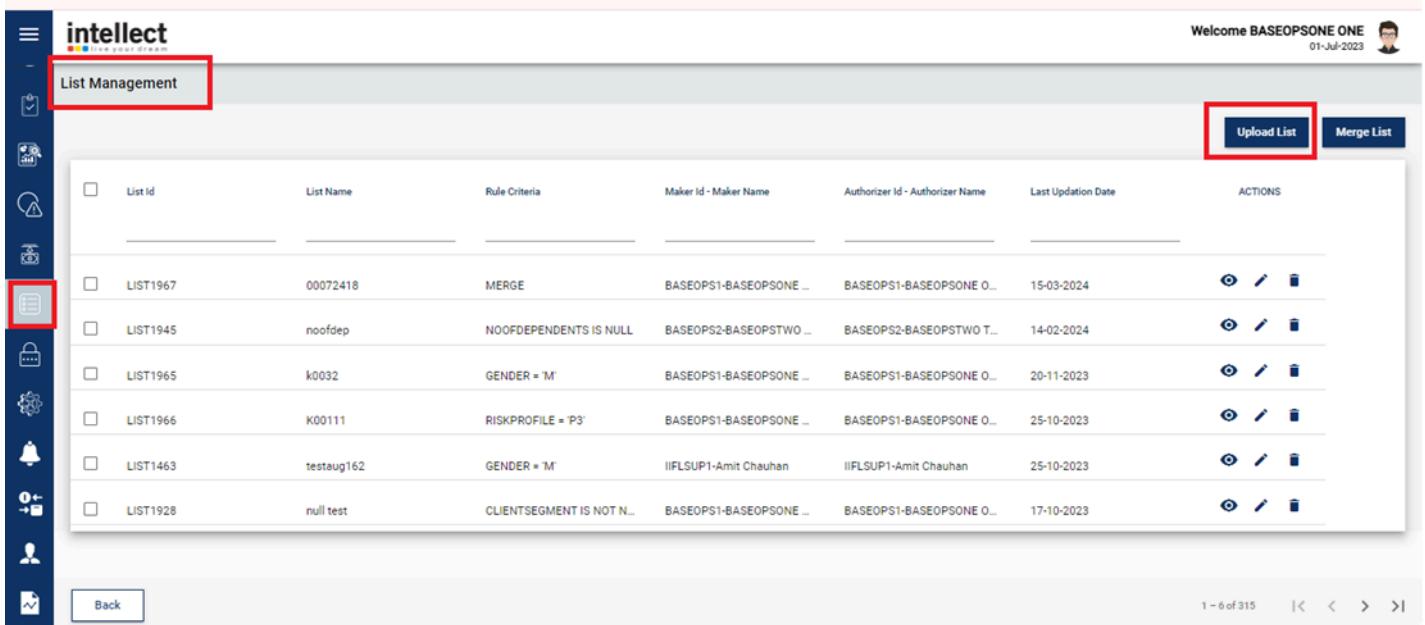
4.2.2.1 Upload Lead List

- The User clicks on “List Management” from the left sidebar menu and selects the “List Management” sub-menu



Screen: Upload Lead List Navigation

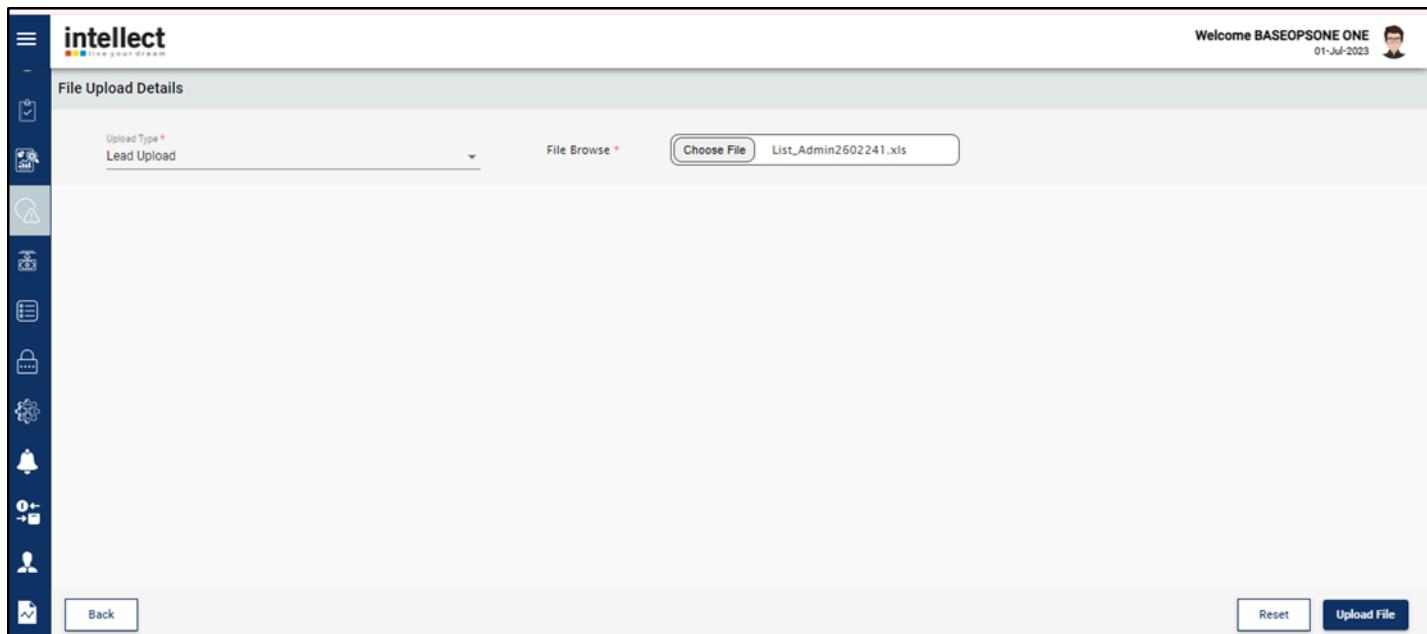
- The user clicks on the “Upload List” button. The file upload menu loads up



<input type="checkbox"/> List Id	List Name	Rule Criteria	Maker Id - Maker Name	Authorizer Id - Authorizer Name	Last Update Date	ACTIONS
<input type="checkbox"/> LIST1967	00072418	MERGE	BASEOPS1-BASEOPSONE ...	BASEOPS1-BASEOPSONE O...	15-03-2024	
<input type="checkbox"/> LIST1945	noofdep	NOOFDEPENDENTS IS NULL	BASEOPS2-BASEOPSTWO ...	BASEOPS2-BASEOPSTWO T...	14-02-2024	
<input type="checkbox"/> LIST1965	k032	GENDER = 'M'	BASEOPS1-BASEOPSONE ...	BASEOPS1-BASEOPSONE O...	20-11-2023	
<input type="checkbox"/> LIST1966	K00111	RISKPROFILE = 'P3'	BASEOPS1-BASEOPSONE ...	BASEOPS1-BASEOPSONE O...	25-10-2023	
<input type="checkbox"/> LIST1463	testaug162	GENDER = 'M'	IIFLSUP1-Amit Chauhan	IIFLSUP1-Amit Chauhan	25-10-2023	
<input type="checkbox"/> LIST1928	null test	CLIENTSEGMENT IS NOT N...	BASEOPS1-BASEOPSONE ...	BASEOPS1-BASEOPSONE O...	17-10-2023	

Screen: Upload Lead List Navigation - Upload Lead List

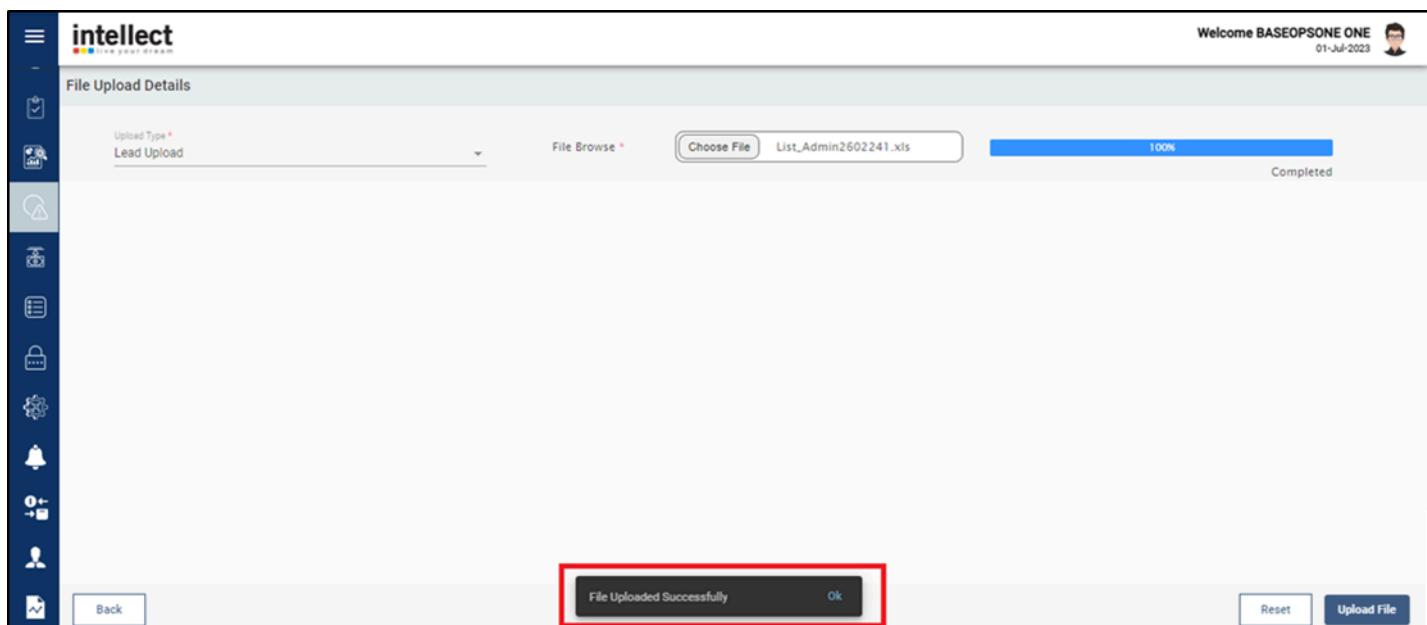
3. User selects “List/Lead Upload” from the dropdown in the Upload Type field and clicks on “Choose File” to select the lead list file (.xls) to be uploaded



The screenshot shows the 'File Upload Details' page. On the left is a vertical sidebar with various icons. The main area has a header 'File Upload Details'. Below it, there's a dropdown labeled 'Upload Type *' with 'Lead Upload' selected. To its right is a 'File Browse *' button with a file path 'List_Admin2602241.xls' displayed. At the bottom are 'Back', 'Reset', and 'Upload File' buttons.

Screen: Choose Lead List for Upload

4. User clicks on the “Upload” button to upload the list



The screenshot shows the same 'File Upload Details' page after the file has been uploaded. The progress bar at the top indicates '100%' and 'Completed'. A message box in the center says 'File Uploaded Successfully' with an 'Ok' button. The rest of the interface is identical to the previous screenshot.

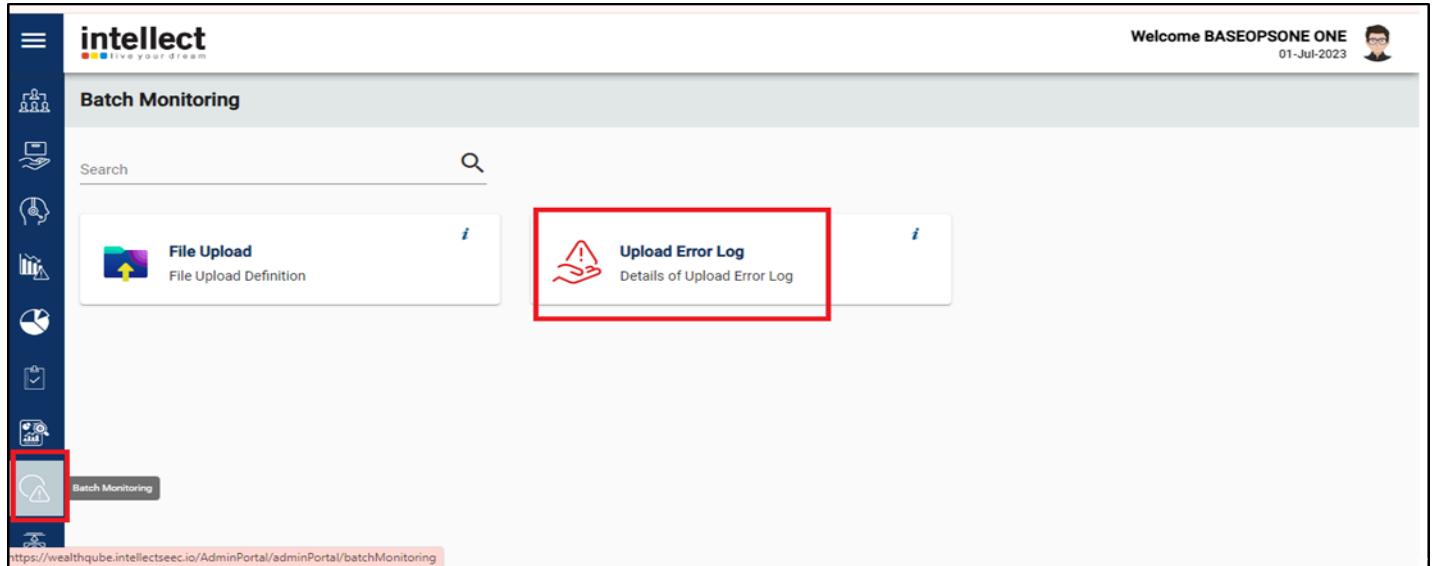
Screen: Lead List –Uploaded

5. All the lead lists are successfully uploaded can be viewed in the List Management screen

4.2.2.2 Review Upload Result - View All Error Log Records

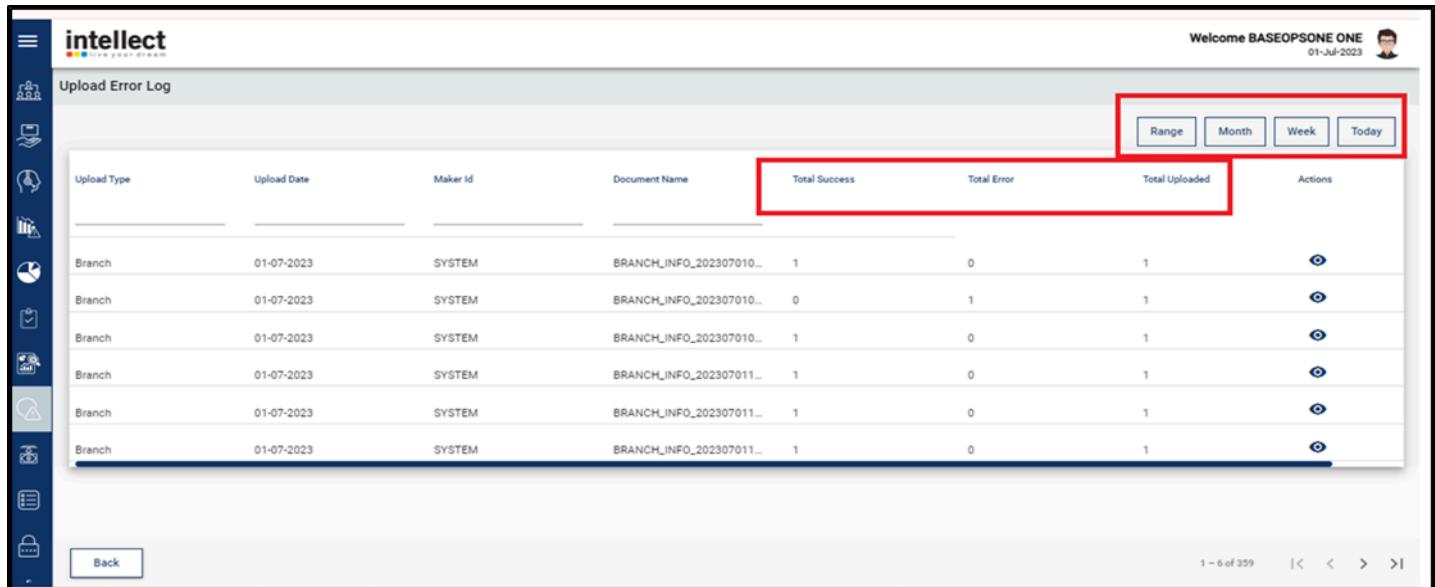
After the upload, the system displays the result of the same in Upload Error Log

1. The user clicks on “Batch Monitoring” on the left sidebar menu and then clicks on the “Upload Error Log” submenu to view the result of the upload



Screen: Upload Error Log Navigation

2. The user views the list of all files uploaded successfully. The user can check the Total Success, Total Error and Total Uploaded records information for the file uploaded. The system allows to filter the records based on uploads done today, week, month, and a specified date range



Upload Error Log

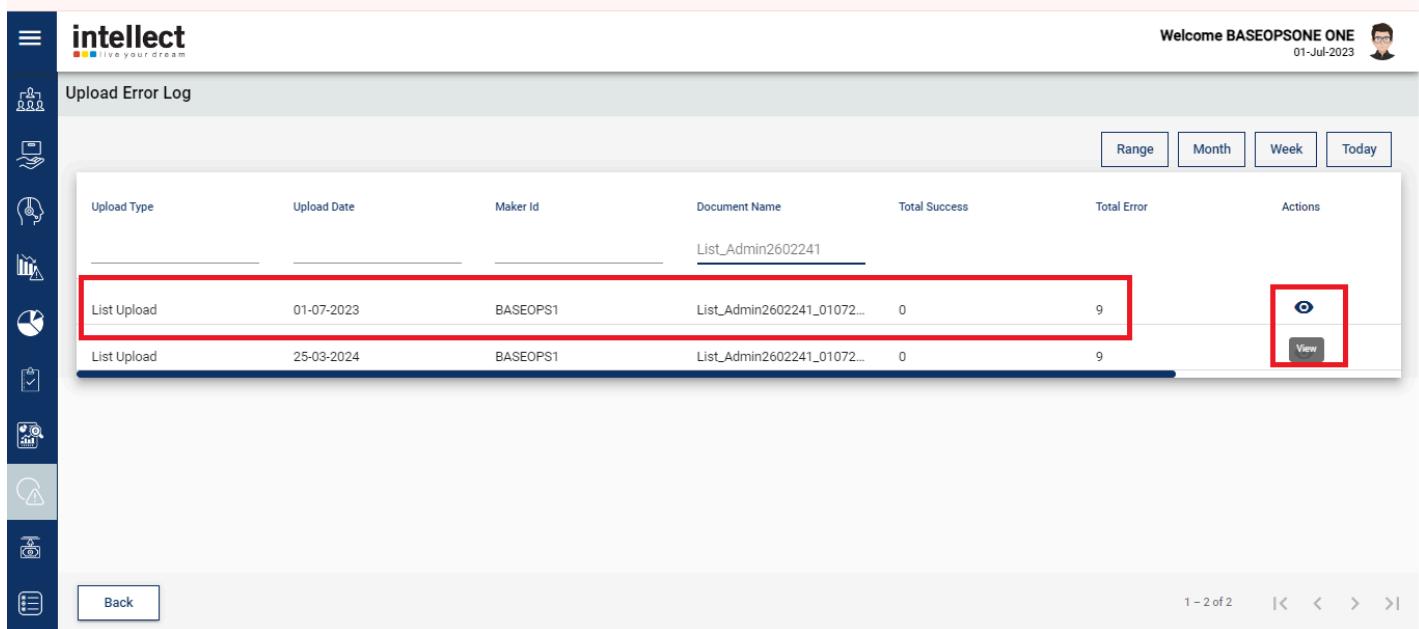
Upload Type	Upload Date	Maker Id	Document Name	Total Success	Total Error	Total Uploaded	Actions
Branch	01-07-2023	SYSTEM	BRANCH_INFO_20230701...	1	0	1	
Branch	01-07-2023	SYSTEM	BRANCH_INFO_20230701...	0	1	1	
Branch	01-07-2023	SYSTEM	BRANCH_INFO_20230701...	1	0	1	
Branch	01-07-2023	SYSTEM	BRANCH_INFO_20230701...	1	0	1	
Branch	01-07-2023	SYSTEM	BRANCH_INFO_20230701...	1	0	1	
Branch	01-07-2023	SYSTEM	BRANCH_INFO_20230701...	1	0	1	

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Screen: Upload Error Log Summary

3. The user can search the file name, select the record, and click on “View” to view the detailed summary of the upload result



Upload Error Log

Upload Type	Upload Date	Maker Id	Document Name	Total Success	Total Error	Actions
List Upload	01-07-2023	BASEOPS1	List_Admin2602241_01072...	0	9	
List Upload	25-03-2024	BASEOPS1	List_Admin2602241_01072...	0	9	View

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Screen: Select Error Log Record for View

4. The user views the detailed log summary of the lead list file uploaded. They can further drill down to the record level and check the status (Success/Error) displayed against each individual record

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Upload Error Log >> Upload Error Log Details

File Name : List_Admin2602241_01072023073959

Success Records:0	Failure Records:9	Total Records:9	Export To Excel				
Upload Status	Legal Entity Code	Customer Name(English)	Customer Name(Local Language)	Rm Owner	Mobile Number	Email	Branch
ERROR	BR0001	Adams	AD	IIFLRM1	91-9332333881	adam@yopmail.com	IIFL01
ERROR	BR0001	Baker	BK	IIFLRM1	91-9332333882	bake@yopmail.com	IIFL01
ERROR	BR0001	Clark	CL	IIFLRM1	91-9332333883	clark@yopmail.com	IIFL01
ERROR	BR0001	Davis	DV	IIFLRM1	91-9332333884	davis@yopmail.com	IIFL01
ERROR	BR0001	Evans	EV	IIFLRM1	91-9332333885	evan@yopmail.com	IIFL01
ERROR	BR0001	Frank	FR	IIFLRM1	91-9332333886	frank@yopmail.com	IIFL01

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Screen: View Error Log Detailed Summary

- They can check the reason for error records by clicking on the “Error” status against the error record. All the records can be downloaded in an Excel file by clicking on the “Export to Excel” button

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Upload Error Log >> Upload Error Log Details

File Name : List_Admin2602241_01072023073959

Success Records:0	Failure Records:9	Total Records:9	Export To Excel			
ERROR	BR0001	Adams	IIFLRM1	91-9332333881	adam@yopmail.com	IIFL01
ERROR	BR0001	Baker	IIFLRM1	91-9332333882	bake@yopmail.com	IIFL01
ERROR	BR0001	Clark	IIFLRM1	91-9332333883	clark@yopmail.com	IIFL01
ERROR	BR0001	Davis	IIFLRM1	91-9332333884	davis@yopmail.com	IIFL01
ERROR	BR0001	Evans	IIFLRM1	91-9332333885	evan@yopmail.com	IIFL01
ERROR	BR0001	Frank	IIFLRM1	91-9332333886	frank@yopmail.com	IIFL01

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Error Message

Sno	Category	ErrorMsg
1	Other	Invalid Branch

OK

Screen: View Error Record with Error Details

- The user can re-upload the error records again after fixing the error. This will be created as a separate list in the system. All the lead lists successfully uploaded can be viewed in the List Management screen

4.2.3 Manual Lead Creation

Leads can be manually created and linked to campaigns in case they were identified after a campaign was created. This has been discussed in detail in the Journey of Lead to Prospect and Prospect to Customer document

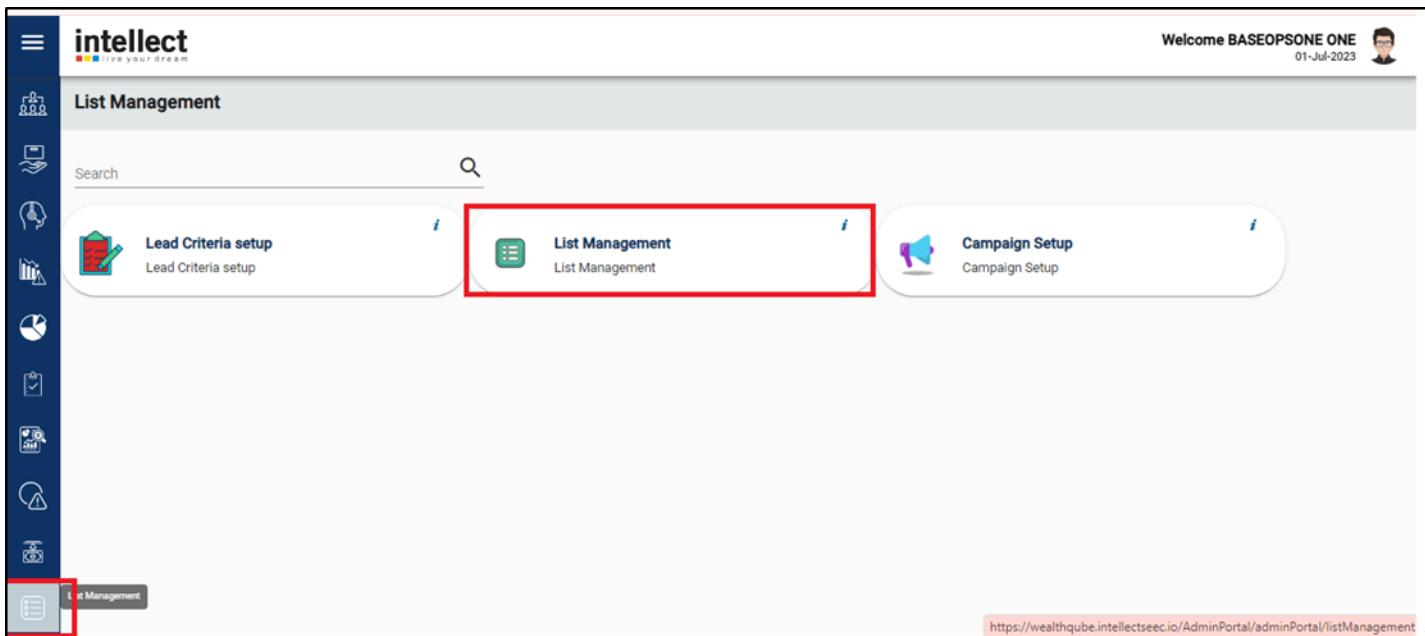
4.2.4 List Management

List Management screen allows the users to view the leads lists present in the system. List Management allows the user to perform the below actions:

- a. View List
- b. Modify List
- c. Merge List
- d. Delete List

NOTE: The lead lists present in the List Management screen will be available for attaching to a Campaign during the Campaign Definition process

1. The User clicks on “List Management” from the left sidebar menu and selects the “List Management” sub-menu



The screenshot shows the Intellect Admin Portal interface. On the left is a vertical sidebar with various icons and a 'List Management' button at the bottom, which is highlighted with a red box. The main content area has a header 'List Management'. Below the header is a search bar and a 'List Management' sub-menu item, also highlighted with a red box. To the right of the sub-menu are other items: 'Lead Criteria setup', 'Campaign Setup', and a 'Help' icon.

Screen: Upload Lead List Navigation

2. The user can view all the existing and newly created lead lists in the system. In the case where lists are generated using the lead rule criteria, the criteria is displayed in the Rule Criteria column. For the lists created by lead upload or merging the lead lists (UPLOAD, MERGE), the same is displayed in the Rule Criteria Column

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01-Jul-2023

List Management

<input type="checkbox"/> List Id	List Name	Rule Criteria	Maker Id - Maker Name	Authorizer Id - Authorizer Name	Last Updation Date	ACTIONS
<input type="checkbox"/> LIST1967	00072418	MERGE	BASEOPS1-BASEOPSONE ...	BASEOPS1-BASEOPSONE O...	15-03-2024	
<input type="checkbox"/> LIST1945	noofdep	NOOFDEPENDENTS IS NULL	BASEOPS2-BASEOPSTWO ...	BASEOPS2-BASEOPSTWO T...	14-02-2024	
<input type="checkbox"/> LIST1965	k0032	GENDER = 'M'	BASEOPS1-BASEOPSONE ...	BASEOPS1-BASEOPSONE O...	20-11-2023	
<input type="checkbox"/> LIST1966	K00111	RISKPROFILE = 'P3'	BASEOPS1-BASEOPSONE ...	BASEOPS1-BASEOPSONE O...	25-10-2023	
<input type="checkbox"/> LIST1463	testaug162	GENDER = 'M'	IIFLSUP1-Amit Chauhan	IIFLSUP1-Amit Chauhan	25-10-2023	
<input type="checkbox"/> LIST1928	null test	CLIENTSEGMENT IS NOT N...	BASEOPS1-BASEOPSONE ...	BASEOPS1-BASEOPSONE O...	17-10-2023	

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Screen: List Management Screen

4.2.4.1 View Lead List

- The user selects the Lead List and clicks on the “View” button to view the list

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01-Jul-2023

List Management

<input type="checkbox"/> List Id	List Name	Rule Criteria	Maker Id - Maker Name	Authorizer Id - Authorizer Name	Last Updation Date	ACTIONS
<input checked="" type="checkbox"/> LIST1967	00072418	MERGE	BASEOPS1-BASEOPSONE ...	BASEOPS1-BASEOPSONE O...	15-03-2024	
<input type="checkbox"/> LIST1945	noofdep	NOOFDEPENDENTS IS NULL	BASEOPS2-BASEOPSTWO ...	BASEOPS2-BASEOPSTWO T...	14-02-2024	
<input type="checkbox"/> LIST1965	k0032	GENDER = 'M'	BASEOPS1-BASEOPSONE ...	BASEOPS1-BASEOPSONE O...	20-11-2023	
<input type="checkbox"/> LIST1966	K00111	RISKPROFILE = 'P3'	BASEOPS1-BASEOPSONE ...	BASEOPS1-BASEOPSONE O...	25-10-2023	
<input type="checkbox"/> LIST1463	testaug162	GENDER = 'M'	IIFLSUP1-Amit Chauhan	IIFLSUP1-Amit Chauhan	25-10-2023	
<input type="checkbox"/> LIST1928	null test	CLIENTSEGMENT IS NOT N...	BASEOPS1-BASEOPSONE ...	BASEOPS1-BASEOPSONE O...	17-10-2023	

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Screen: View the Lead List

- The user views the Lead List Information and clicks on the “Back” button to navigate back to the list management

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01-Jul-2023

List Management

Export To Excel | View List

SEQUENCE ID/LEAD ID	CUSTOMER NAME / ENTITY NAME	RELATIONSHIP MANAGER NAME & ID	BRANCH	CIRCLE
00072050	PTRS162	-	BRC0001	North
00072410	Trisha	-	BRC0001	North
00072985	null	-	BRC0001	North
00072115	Siva3001	-	BRC0001	North
00072110	keerthana	-	BRC0001	North
00072060	DashRM3005	-	BRC0001	North

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Screen: View the Lead List - Leads Information

4.2.4.2 Modify Lead List

- User selects the Lead List and clicks on the “Modify” button to modify the list

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List Management

Upload List | Merge List

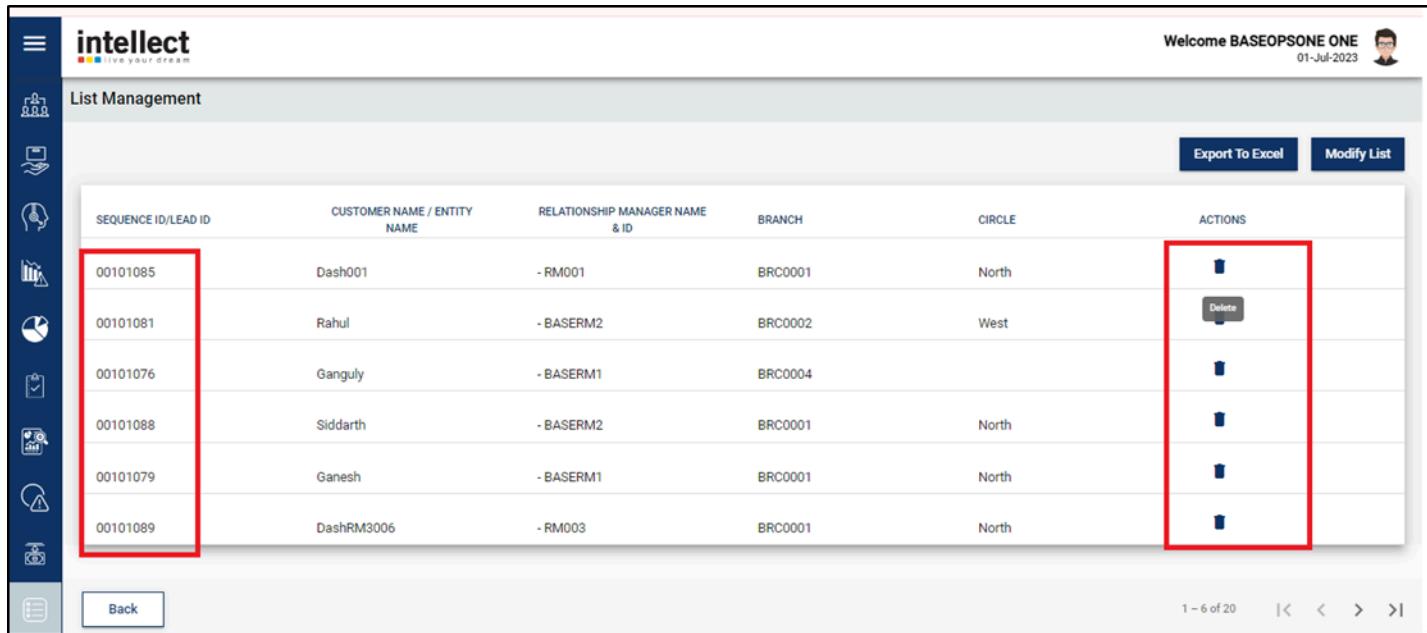
<input type="checkbox"/> List Id	List Name	Rule Criteria	Maker Id - Maker Name	Authorizer Id - Authorizer Name	Last Updation Date	ACTIONS
<input checked="" type="checkbox"/> LIST1967	00072418	MERGE	BASEOPS1-BASEOPSONE ...	BASEOPS1-BASEOPSONE O...	15-03-2024	 
<input type="checkbox"/> LIST1945	noofdep	NOOFDEPENDENTS IS NULL	BASEOPS2-BASEOPSTWO ...	BASEOPS2-BASEOPSTWO T...	14-02-2024	 
<input type="checkbox"/> LIST1965	k0032	GENDER = 'M'	BASEOPS1-BASEOPSONE ...	BASEOPS1-BASEOPSONE O...	20-11-2023	 
<input type="checkbox"/> LIST1966	K00111	RISKPROFILE = 'P3'	BASEOPS1-BASEOPSONE ...	BASEOPS1-BASEOPSONE O...	25-10-2023	 
<input type="checkbox"/> LIST1463	testaug162	GENDER = 'M'	IIFLSUP1-Amit Chauhan	IIFLSUP1-Amit Chauhan	25-10-2023	 
<input type="checkbox"/> LIST1464	testaug163	GENDER = 'M'	IIFLSUP1-Amit Chauhan	IIFLSUP1-Amit Chauhan	25-10-2023	 

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Screen: Modify the Lead List

- User clicks on the “Remove” button against the lead record to remove the lead from the list and clicks on “Modify List” and “Submit” to modify the list. Multiple such records can be removed from the list

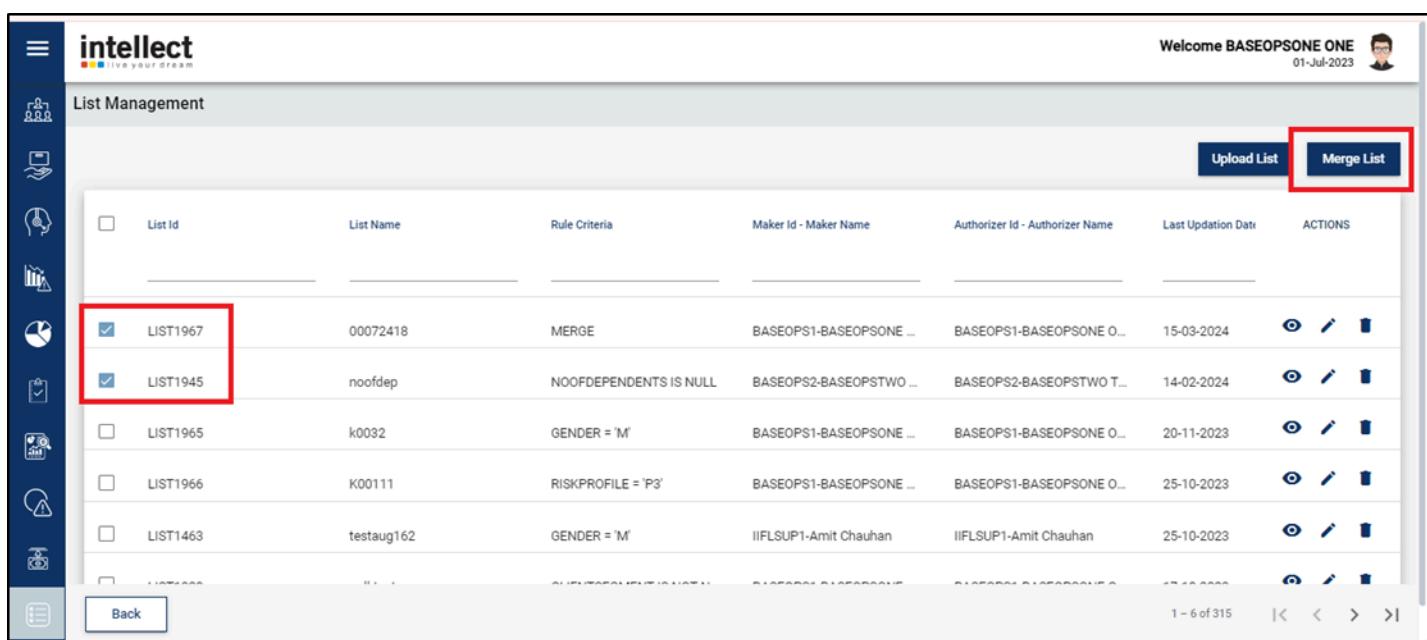


Screen: Remove the Lead from Lead List

4.2.4.3 Merge Lead Lists

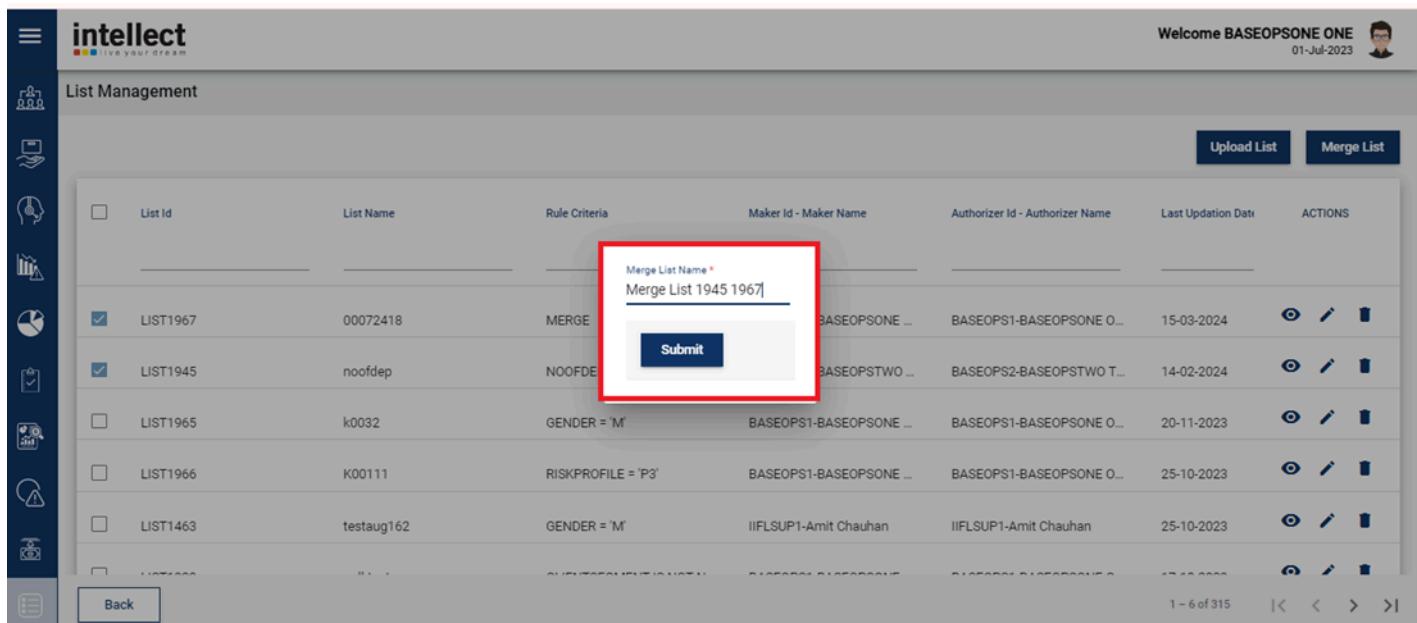
Multiple lists present in the list management can be merged to create a single list. This will be created as a new list in the system

- The user selects the lists by clicking on the checkbox available against each record and clicks on the “Merge List” button



Screen: Merge Lead Lists

2. The user inputs the list name for the merged list and clicks on “Submit” and a new list is created

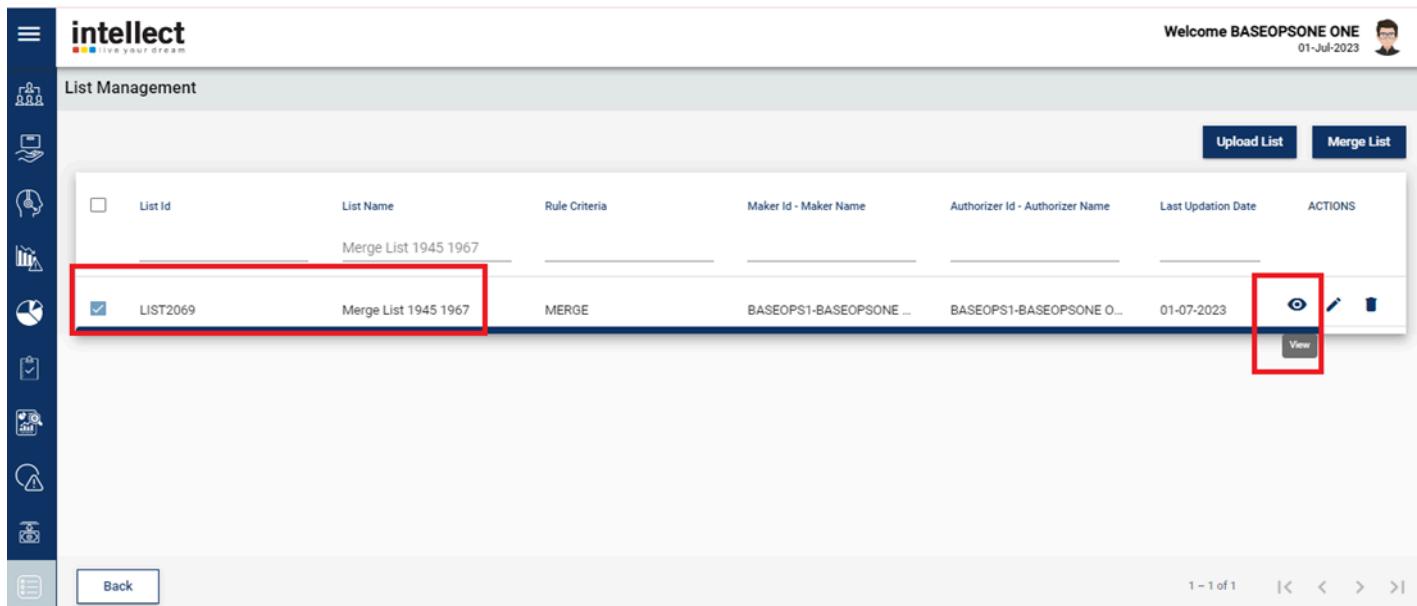


The screenshot shows the Intellect List Management interface. A modal window is open, prompting the user to enter a 'Merge List Name' with the value 'Merge List 1945 1967'. A red box highlights this input field. Below it is a blue 'Submit' button. The background table lists various lead lists with their details like List ID, List Name, Rule Criteria, Maker ID, Authorizer ID, and Last Update Date. One row is selected, and its details are visible in the modal.

List Id	List Name	Rule Criteria	Maker Id - Maker Name	Authorizer Id - Authorizer Name	Last Updation Date	ACTIONS
LIST1967	00072418	MERGE	BASEOPSONE ...	BASEOPS1-BASEOPSONE O...	15-03-2024	
LIST1945	noofdep	NOOFDE	BASEOPSTWO ...	BASEOPS2-BASEOPSTWO T...	14-02-2024	
LIST1965	k0032	GENDER = 'M'	BASEOPS1-BASEOPSONE ...	BASEOPS1-BASEOPSONE O...	20-11-2023	
LIST1966	K00111	RISKPROFILE = 'P3'	BASEOPS1-BASEOPSONE ...	BASEOPS1-BASEOPSONE O...	25-10-2023	
LIST1463	testaug162	GENDER = 'M'	IIFLSUP1-Amit Chauhan	IIFLSUP1-Amit Chauhan	25-10-2023	

Screen: Creating Merged Lead List

3. The user selects the merged lead list record and clicks on the “View” button to view the leads



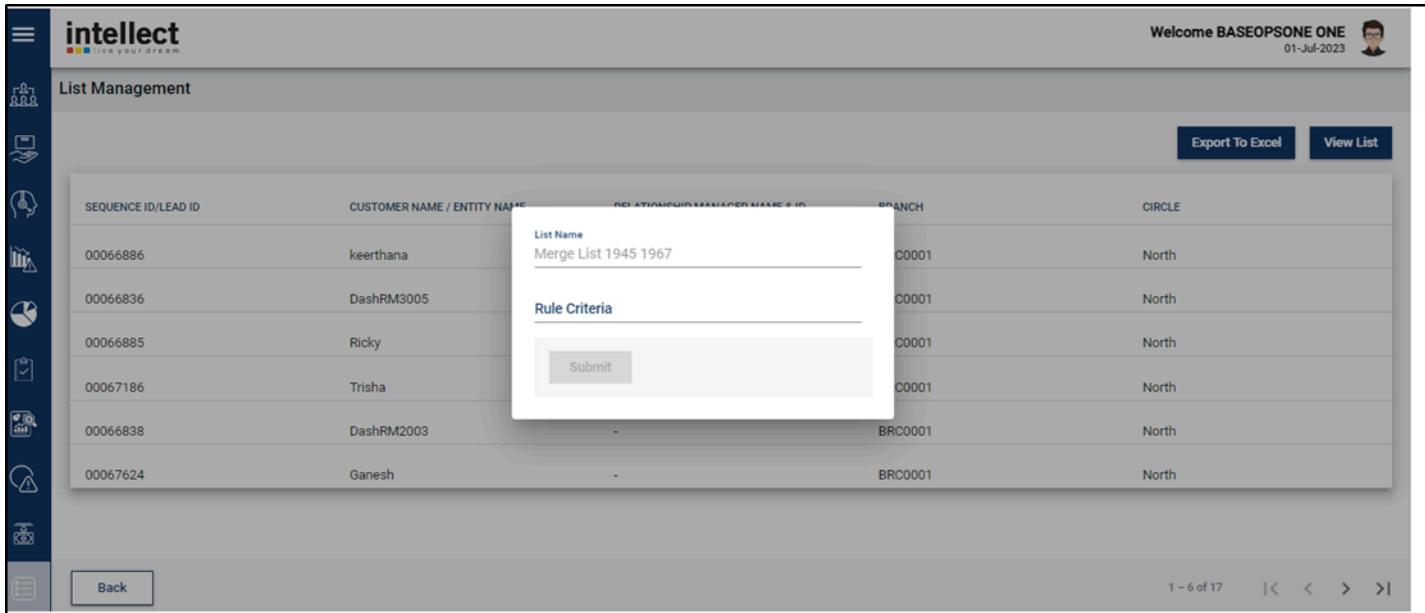
The screenshot shows the Intellect List Management interface after the merge. The merged list 'Merge List 1945 1967' is now listed in the table with a checked checkbox. A red box highlights this row. In the 'ACTIONS' column for this row, there is a 'View' button, which is also highlighted with a red box. The rest of the table and interface remain the same as the previous screenshot.

List Id	List Name	Rule Criteria	Maker Id - Maker Name	Authorizer Id - Authorizer Name	Last Updation Date	ACTIONS
LIST2069	Merge List 1945 1967	MERGE	BASEOPS1-BASEOPSONE ...	BASEOPS1-BASEOPSONE O...	01-07-2023	

Screen: Select the Merged Lead List for View

4. The user can view the list of leads present in the merged lead list. A List created by merging multiple existing lists will be checked for uniqueness at each record level on the following parameters:

- Customer Name(English) + Primary Contact No
- Customer Name(English) + Email
- Customer Name(Local Language) + Primary Contact No
- Customer Name(Local Language) + Email



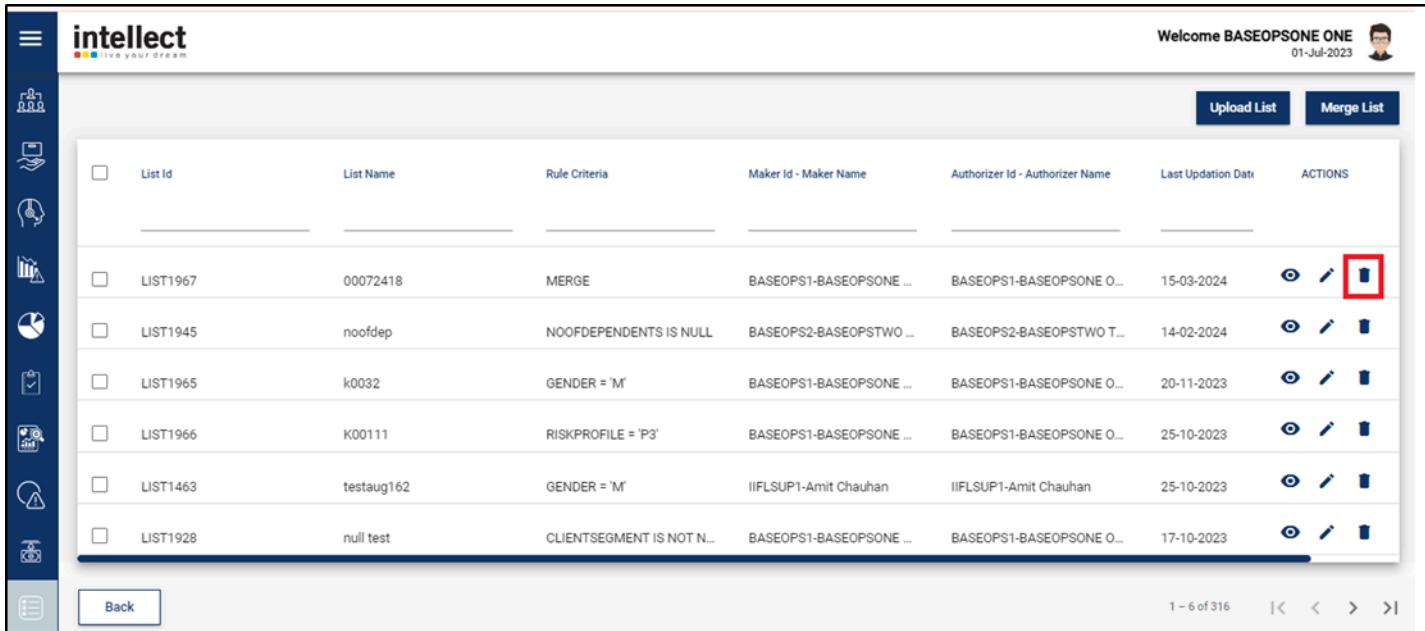
The screenshot shows the Intellect List Management interface. A modal window is open in the center, prompting for a 'List Name' (Merge List 1945 1967) and 'Rule Criteria'. A 'Submit' button is at the bottom of the modal. The background table lists various leads with columns for Sequence ID/Lead ID, Customer Name / Entity Name, Branch, and Circle. The 'Circle' column shows 'North' for all entries.

SEQUENCE ID/LEAD ID	CUSTOMER NAME / ENTITY NAME	BRANCH	CIRCLE
00066886	keerthana	C0001	North
00066836	DashRM3005	C0001	North
00066885	Ricky	C0001	North
00067186	Trisha	C0001	North
00066838	DashRM2003	BR00001	North
00067624	Ganesh	BR00001	North

Screen: View Merged Lead List

4.2.4.4 Delete Lead List

- User selects the Lead List and clicks on the "Delete" button to delete the list



The screenshot shows the Intellect List Management interface displaying a list of lead lists. Each row contains columns for List Id, List Name, Rule Criteria, Maker Id - Maker Name, Authorizer Id - Authorizer Name, Last Updation Date, and ACTIONS. A red box highlights the delete icon (a small trash bin) in the ACTIONS column for the first listed item, LIST1967.

List Id	List Name	Rule Criteria	Maker Id - Maker Name	Authorizer Id - Authorizer Name	Last Updation Date	ACTIONS	
LIST1967	00072418	MERGE	BASEOPS1-BASEOPSONE ...	BASEOPS1-BASEOPSONE O...	15-03-2024		
LIST1945	noofdep	NOOFDEPENDENTS IS NULL	BASEOPS2-BASEOPSTWO ...	BASEOPS2-BASEOPSTWO T...	14-02-2024		
LIST1965	k0032	GENDER = 'M'	BASEOPS1-BASEOPSONE ...	BASEOPS1-BASEOPSONE O...	20-11-2023		
LIST1966	K00111	RISKPROFILE = 'P3'	BASEOPS1-BASEOPSONE ...	BASEOPS1-BASEOPSONE O...	25-10-2023		
LIST1463	testaug162	GENDER = 'M'	IIFLSUP1-Amit Chauhan	IIFLSUP1-Amit Chauhan	25-10-2023		
LIST1928	null test	CLIENTSEGMENT IS NOT N...	BASEOPS1-BASEOPSONE ...	BASEOPS1-BASEOPSONE O...	17-10-2023		

Screen: Delete Lead List

2. The user clicks on the “Delete” icon and then “Submit” to delete the list

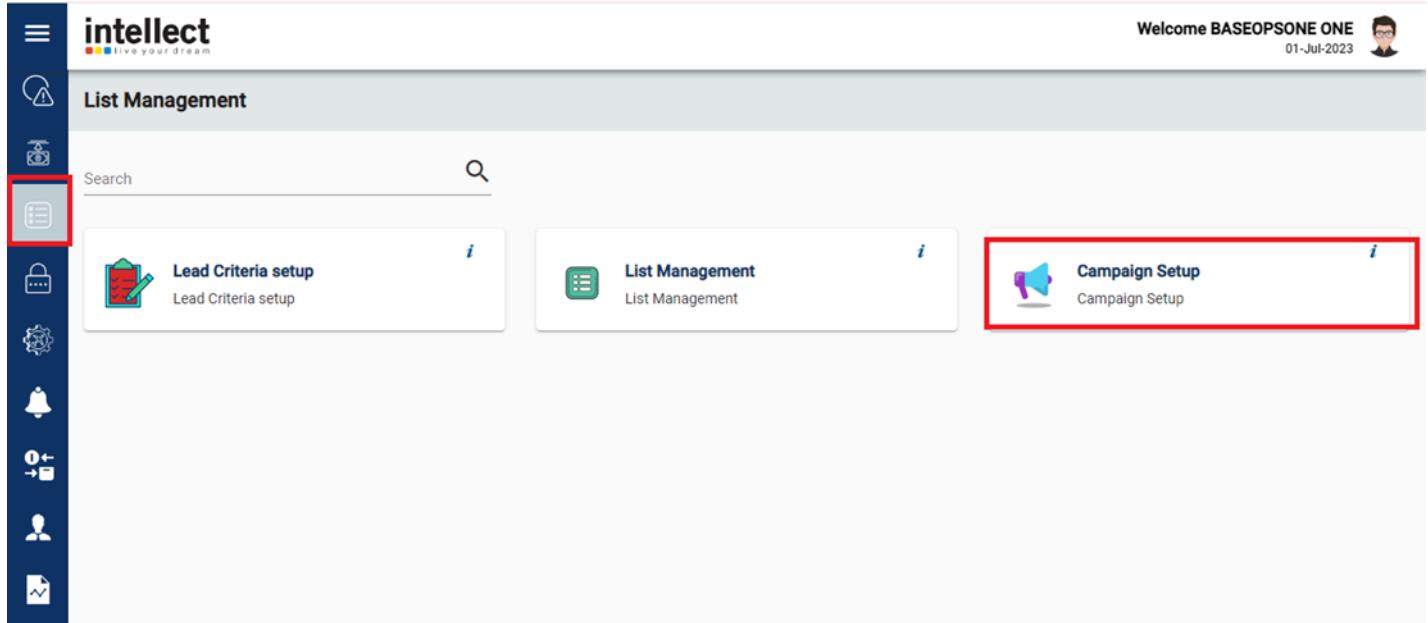
Note: Lists that are linked to a campaign can't be deleted

4.3 Campaign Management

The next step in this journey is to use the list of leads generated/uploaded to create a campaign. Once the user has the list, they can use it in a campaign that they wish to run. In this step, the User can perform the following actions:

- 4.3.1. Define a New Campaign
- 4.3.2. Modify an Existing Campaign
- 4.3.3. Copy a Campaign
- 4.3.4. View a Campaign
- 4.3.5. Delete a Campaign
- 4.3.6. Campaign Communication
- 4.3.7. Supervisor Approval
- 4.3.8. View Campaign Dashboard
- 4.3.9. Capture Responses
- 4.3.10. File Call Report

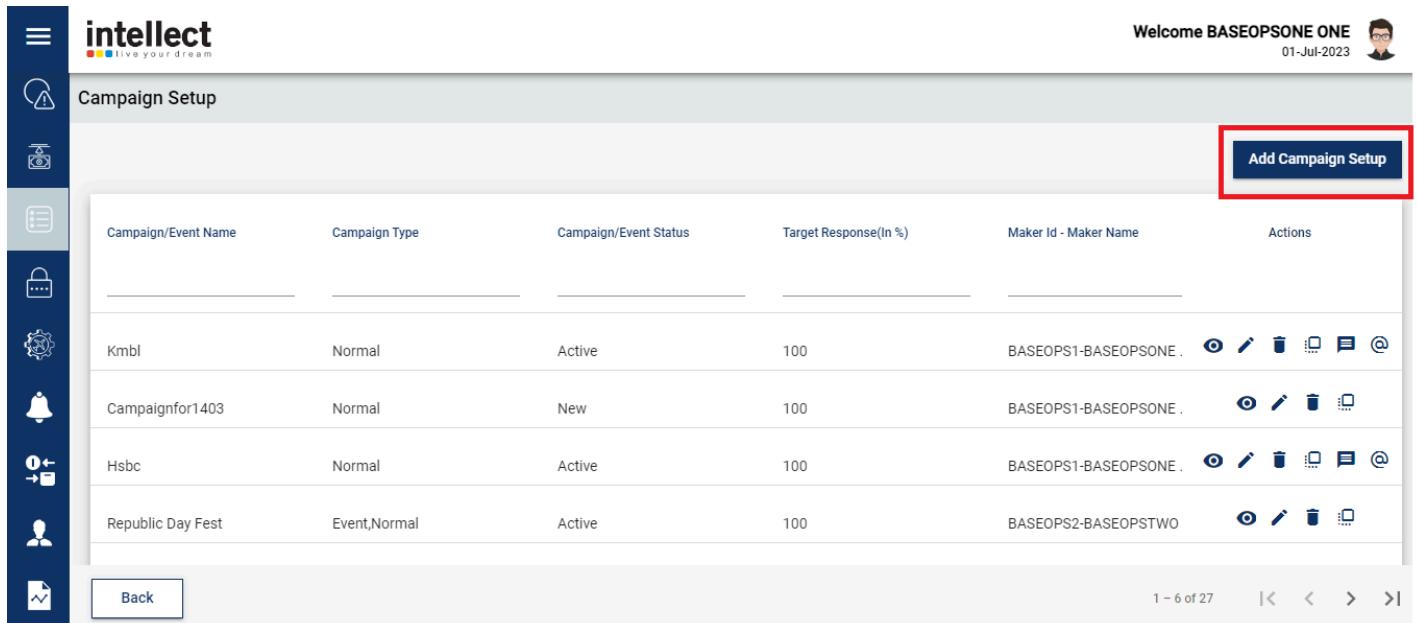
User logs into Operations office, clicks on the “List Management” menu from left sidebar menu and then clicks on the “Campaign Setup” sub-menu



Screen: Navigate to the Campaign Management screen

4.3.1 Define a New Campaign

- On the Campaign Management screen, the User clicks on the “New” button to navigate to the New Campaign screen, where they can create a new campaign



Campaign/Event Name	Campaign Type	Campaign/Event Status	Target Response(In %)	Maker Id - Maker Name	Actions
Kmbl	Normal	Active	100	BASEOPS1-BASEOPSONE .	
Campaignfor1403	Normal	New	100	BASEOPS1-BASEOPSONE .	
Hsbc	Normal	Active	100	BASEOPS1-BASEOPSONE .	
Republic Day Fest	Event,Normal	Active	100	BASEOPS2-BASEOPSTWO	

Screen: Define a New Campaign

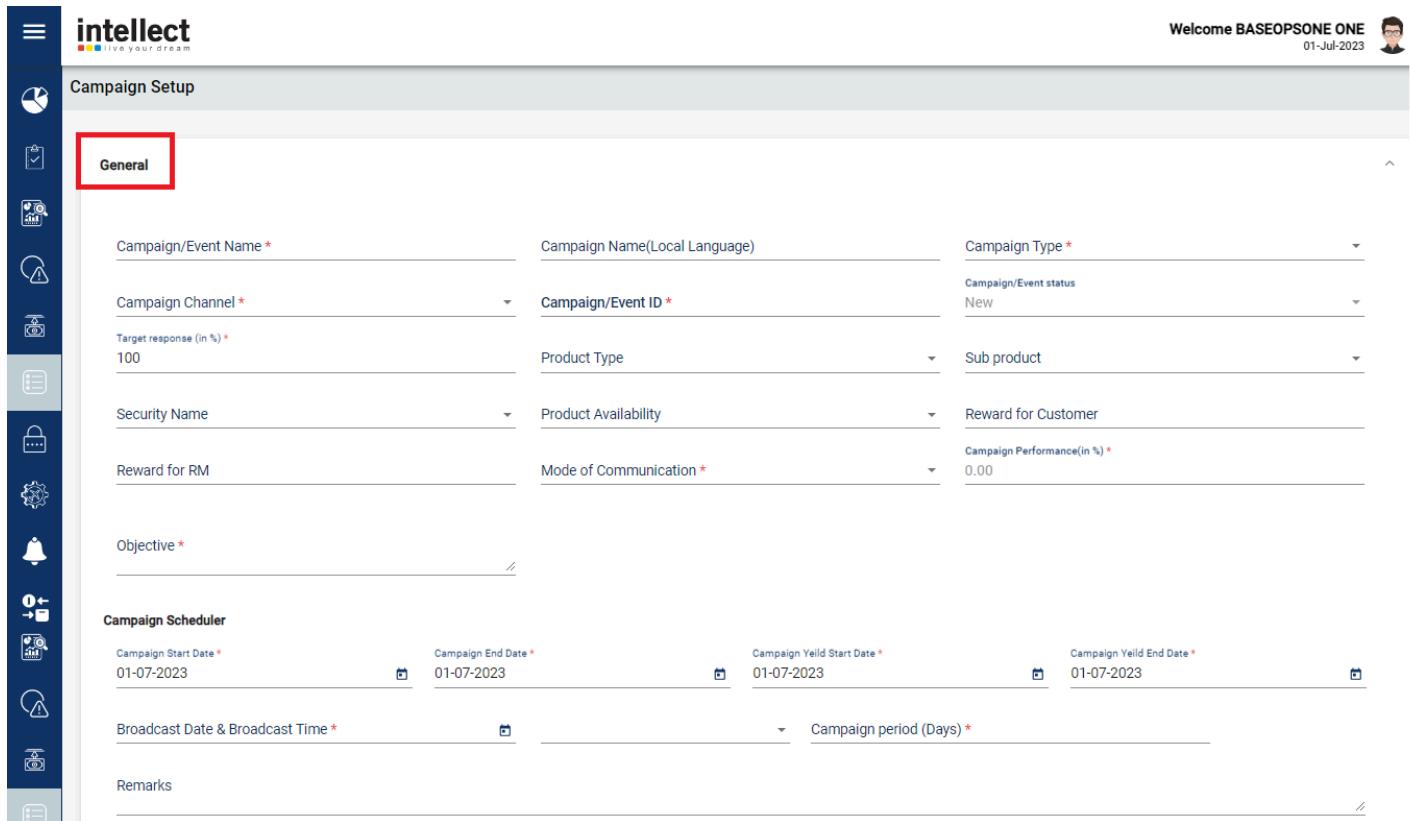
- On the New Campaign screen, the User can navigate through the following tabs to capture campaign details:

- a. **General** - Capture General information such as Campaign Name, Channel, etc.



The screenshot shows the 'Campaign Setup' page. On the left is a vertical sidebar with icons for Home, Campaign, Financials, Admin, Campaign Notes, Brochure(s), and Help. The main area has tabs: 'General' (selected and highlighted with a red box), 'Financials', 'Admin', 'Campaign Notes', and 'Brochure(s)'. At the bottom are buttons for 'Back', 'Reset', 'Preview', 'Save as draft', and 'Save'.

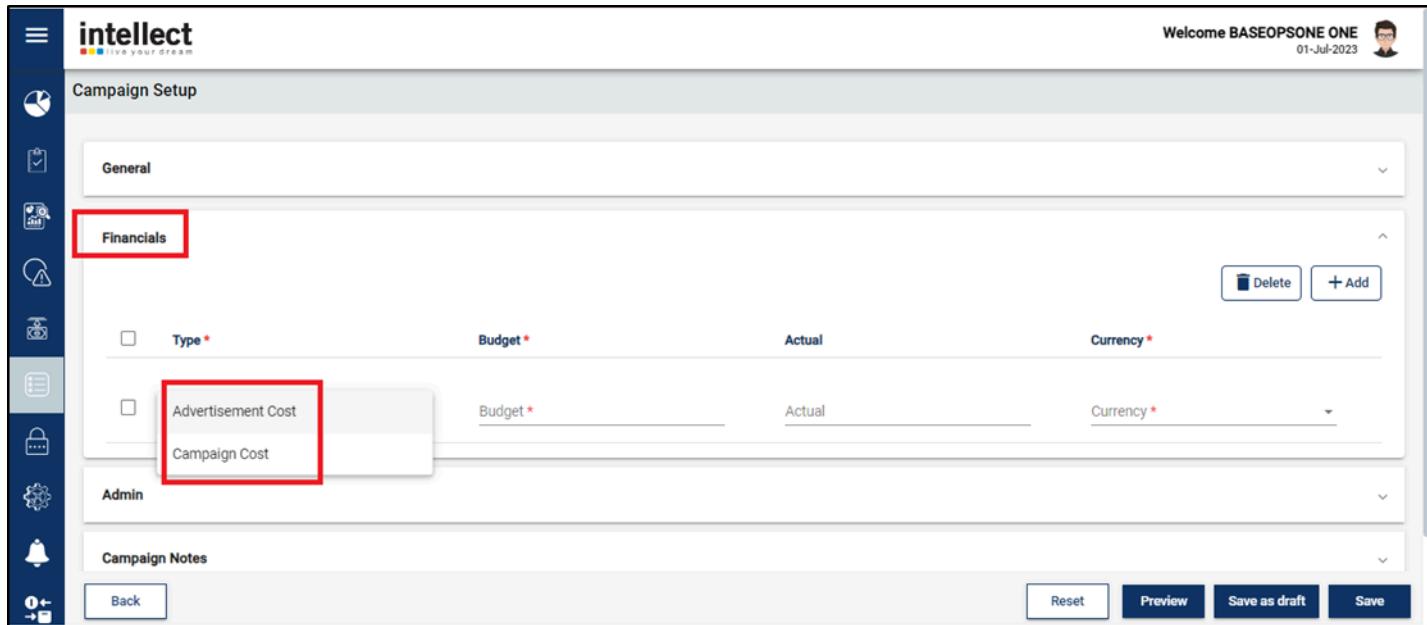
Screen: Campaign Setup



The screenshot shows the 'General' tab of the 'Campaign Setup' page. It includes fields for Campaign/Event Name*, Campaign Name(Local Language), Campaign Type*, Campaign Channel*, Campaign/Event ID*, Campaign/Event status (New), Target response (in %) (100), Product Type, Sub product, Security Name, Product Availability, Reward for Customer, Reward for RM, Mode of Communication*, Objective*, and Campaign Performance(in %) (0.00). Below this is the 'Campaign Scheduler' section with fields for Campaign Start Date (01-07-2023), Campaign End Date (01-07-2023), Campaign Yield Start Date (01-07-2023), Campaign Yield End Date (01-07-2023), Broadcast Date & Broadcast Time*, and Campaign period (Days)*. There is also a Remarks field at the bottom.

Screen: Capture General Information

- b. **Financial** - Capture Financials such as Advertisement and Campaign cost



Welcome BASEOPSONE ONE
01-Jul-2023

Campaign Setup

General

Financials

Type *	Budget *	Actual	Currency *
<input type="checkbox"/> Advertisement Cost	Budget *	Actual	Currency *
<input type="checkbox"/> Campaign Cost			

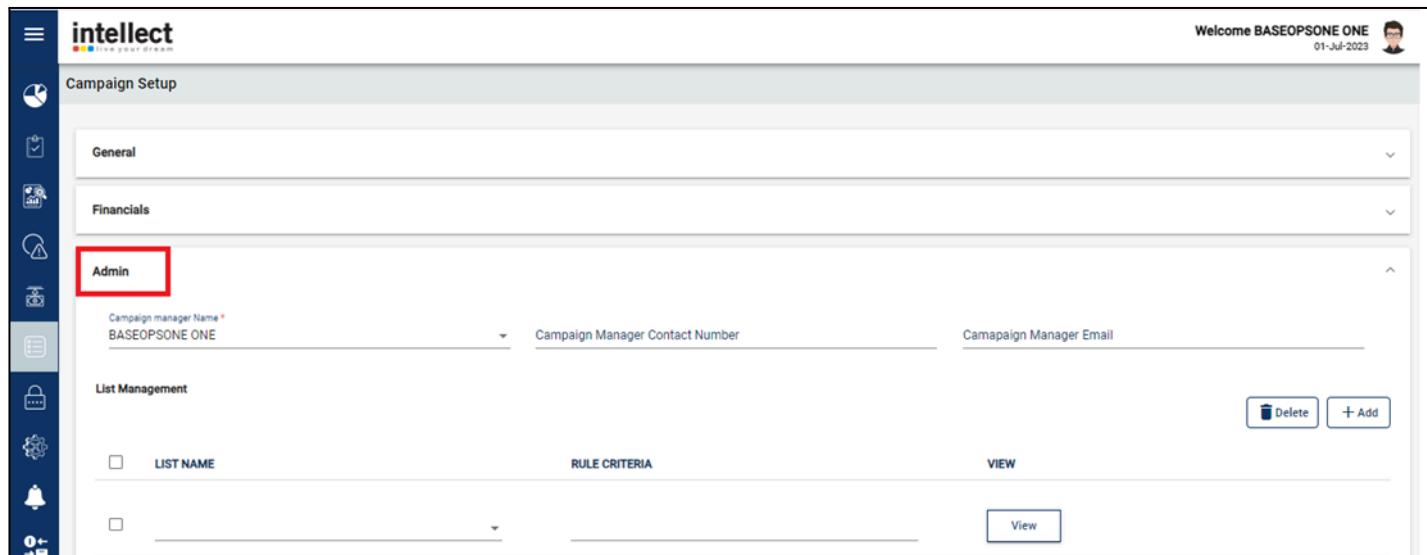
Admin

Campaign Notes

Back Reset Preview Save as draft Save

Screen: Capture Financial Information

- c. **Admin** - Capture Campaign Manager details and select the target List



Welcome BASEOPSONE ONE
01-Jul-2023

Campaign Setup

General

Financials

Admin

Campaign manager Name *	Campaign Manager Contact Number	Campaign Manager Email
-------------------------	---------------------------------	------------------------

Campaign manager Name *

Campaign Manager Contact Number

Campaign Manager Email

Delete + Add

List Management

LIST NAME	RULE CRITERIA	VIEW
		<input type="button" value="View"/>

Screen: Capture Admin details and Target List

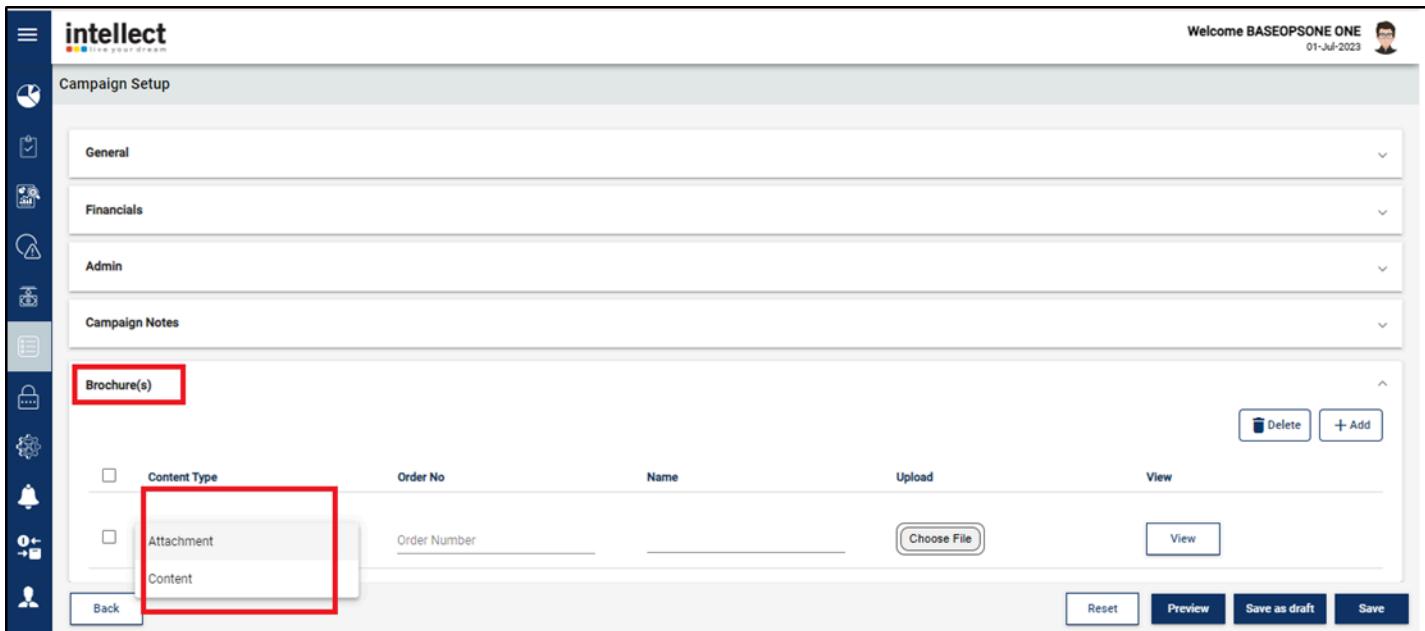
- d. **Campaign Notes** - Capture content for the Email and/or SMS that will be sent out as part of the campaign. The sections here will depend on the Campaign channels selected



The screenshot shows a user interface for capturing campaign notes. On the left is a vertical toolbar with icons for navigation, reports, financials, admin, and other functions. The main area has a header "Welcome BASEOPSONE ONE" and a date "01-Jul-2023". A sidebar on the left lists sections: General, Financials, Admin, and Campaign Notes, with "Campaign Notes" currently selected and highlighted with a red box. The main content area contains fields for "Subject *", "Signature *", and "SMS *". Below the signature field is a rich text editor toolbar and a text input field labeled "Type Here...".

Screen: Capture Campaign Notes

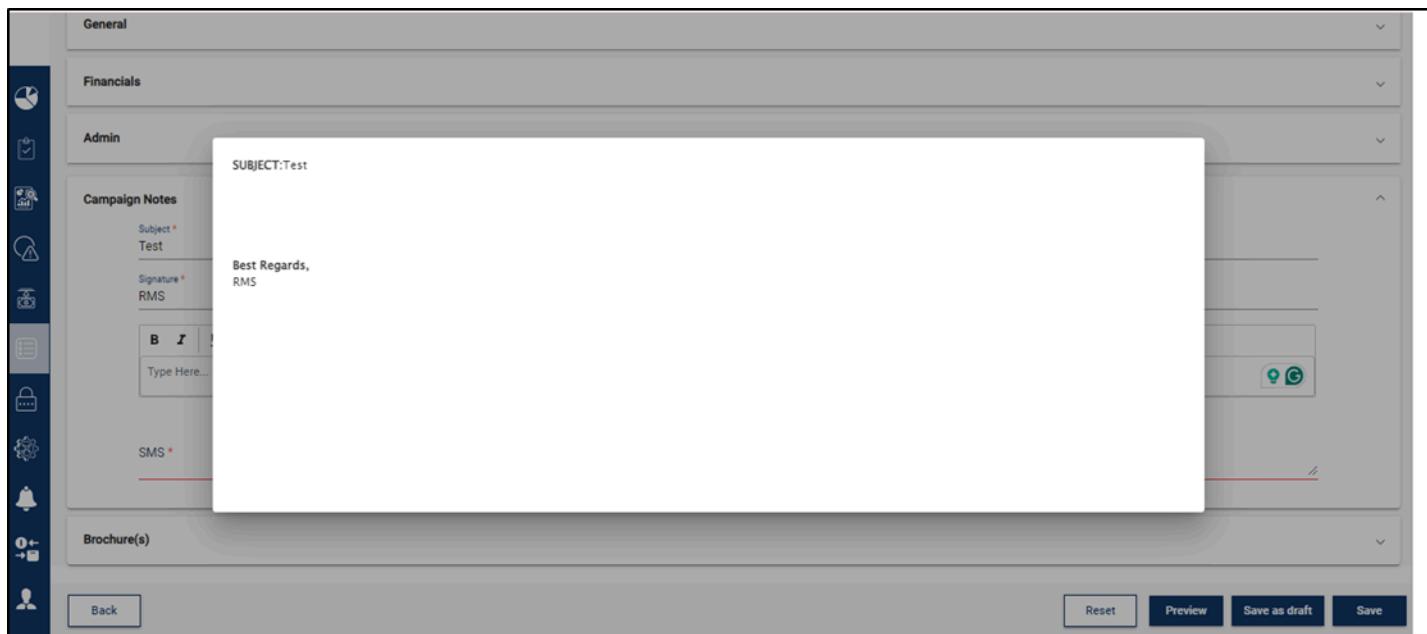
- e. **Brochure** - Attach brochures related to the campaign



The screenshot shows a user interface for attaching brochures. The left sidebar includes sections for General, Financials, Admin, and Campaign Notes. The main area is titled "Campaign Setup" and shows a table for managing brochure attachments. The table columns are: Content Type, Order No, Name, Upload, and View. A row is being edited, with the "Content Type" field set to "Attachment" and the "Name" field containing "Order Number". There is a "Choose File" button and a "View" button. At the bottom of the table are buttons for "Delete", "+ Add", "Reset", "Preview", "Save as draft", and "Save". A red box highlights the "Content Type" dropdown menu, which is open to show options: Attachment and Content.

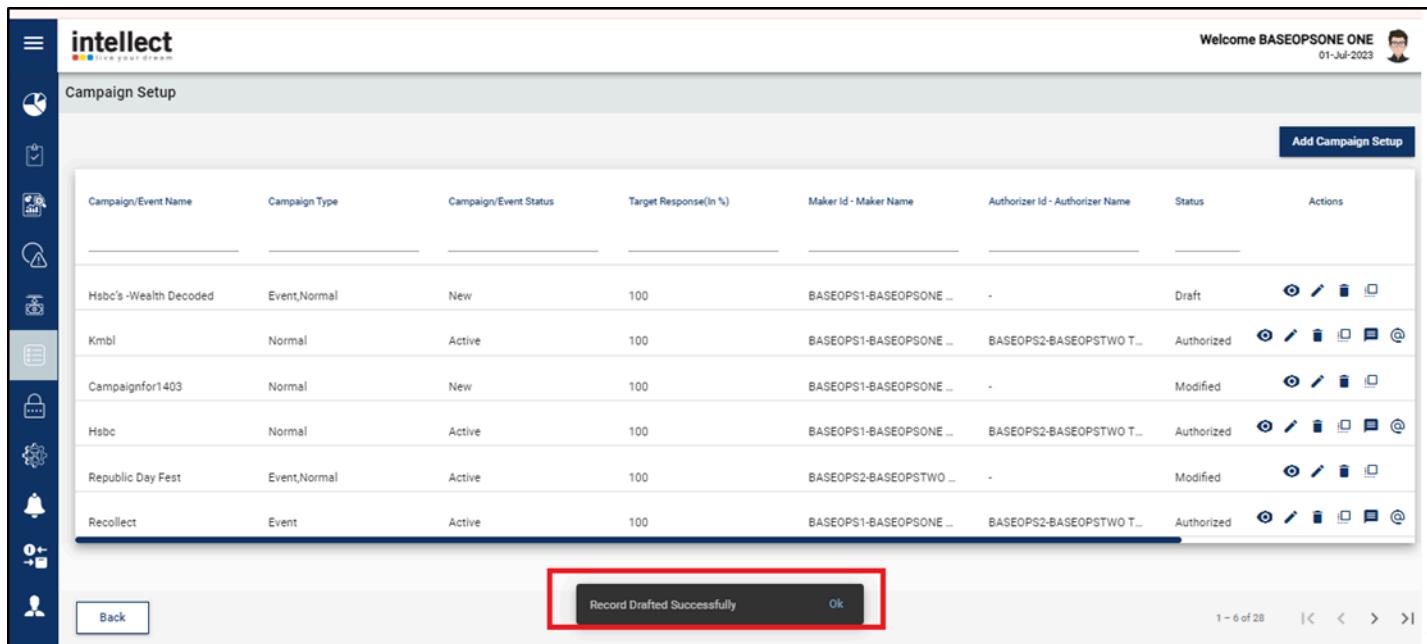
Screen: Attach Brochures

- f. After the User has captured all relevant details related to the campaign, they can perform the following actions:
 - i. **Preview** - Click on the “Preview” button to view the Email details related to the campaign. At the time of email broadcasting, the system will automatically frame the email as per the Header, Subject, Body Text, and Signature as shown below. For SMS broadcasting, SMS Content will be used. Email/SMS are broadcasted to the leads as per the Broadcast date and time



Screen: Preview Email

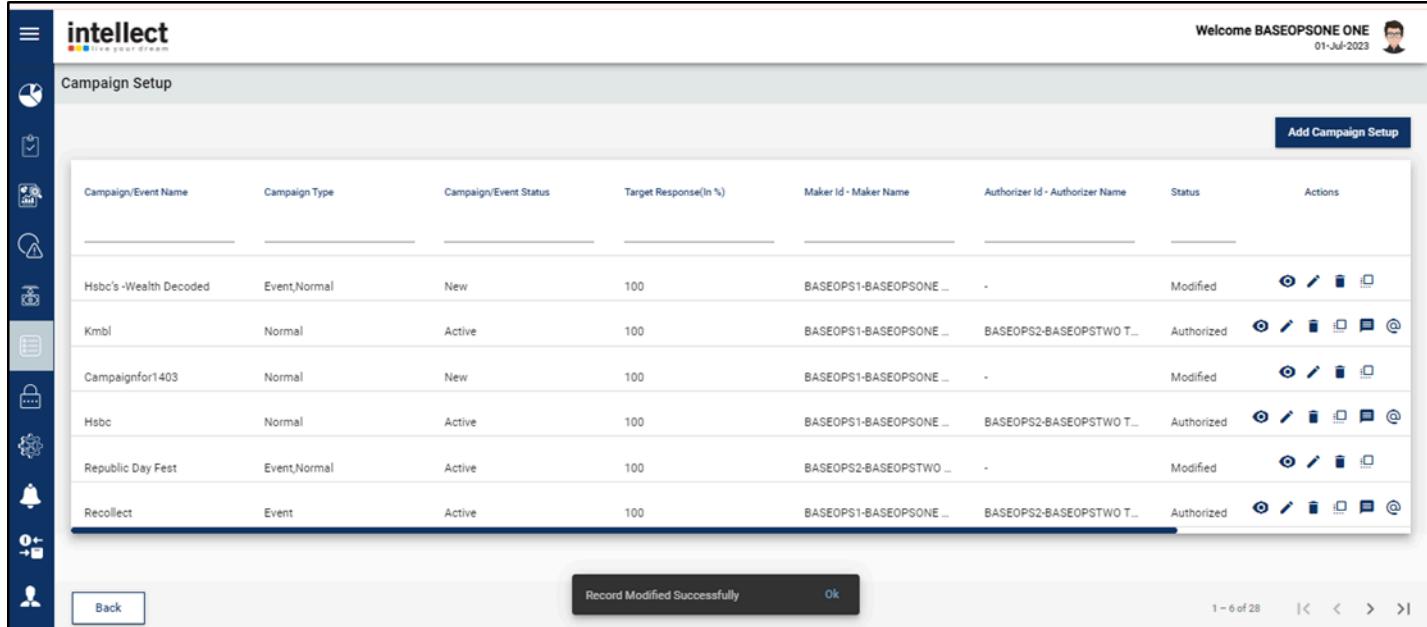
- ii. **Save as Draft** - Click on the “Save as Draft” button to save the campaign in draft mode. Campaigns with such a status are not sent for approval. The draft can be viewed/modified from the Campaign Management screen



Campaign/Event Name	Campaign Type	Campaign/Event Status	Target Response(In %)	Maker Id - Maker Name	Authorizer Id - Authorizer Name	Status	Actions
Hsbc's -Wealth Decoded	Event,Normal	New	100	BASEOPS1-BASEOPSONE ...	-	Draft	
Kmbl	Normal	Active	100	BASEOPS1-BASEOPSONE ...	BASEOPS2-BASEOPSTWO T...	Authorized	
Campaignfor1403	Normal	New	100	BASEOPS1-BASEOPSONE ...	-	Modified	
Hsbc	Normal	Active	100	BASEOPS1-BASEOPSONE ...	BASEOPS2-BASEOPSTWO T...	Authorized	
Republic Day Fest	Event,Normal	Active	100	BASEOPS2-BASEOPSTWO ...	-	Modified	
Recollect	Event	Active	100	BASEOPS1-BASEOPSONE ...	BASEOPS2-BASEOPSTWO T...	Authorized	

Screen: Save as Draft

- iii. **Save** - Click on the “Save” button to Save the campaign details. After the campaign has been saved, it goes to the Supervisor for Approval



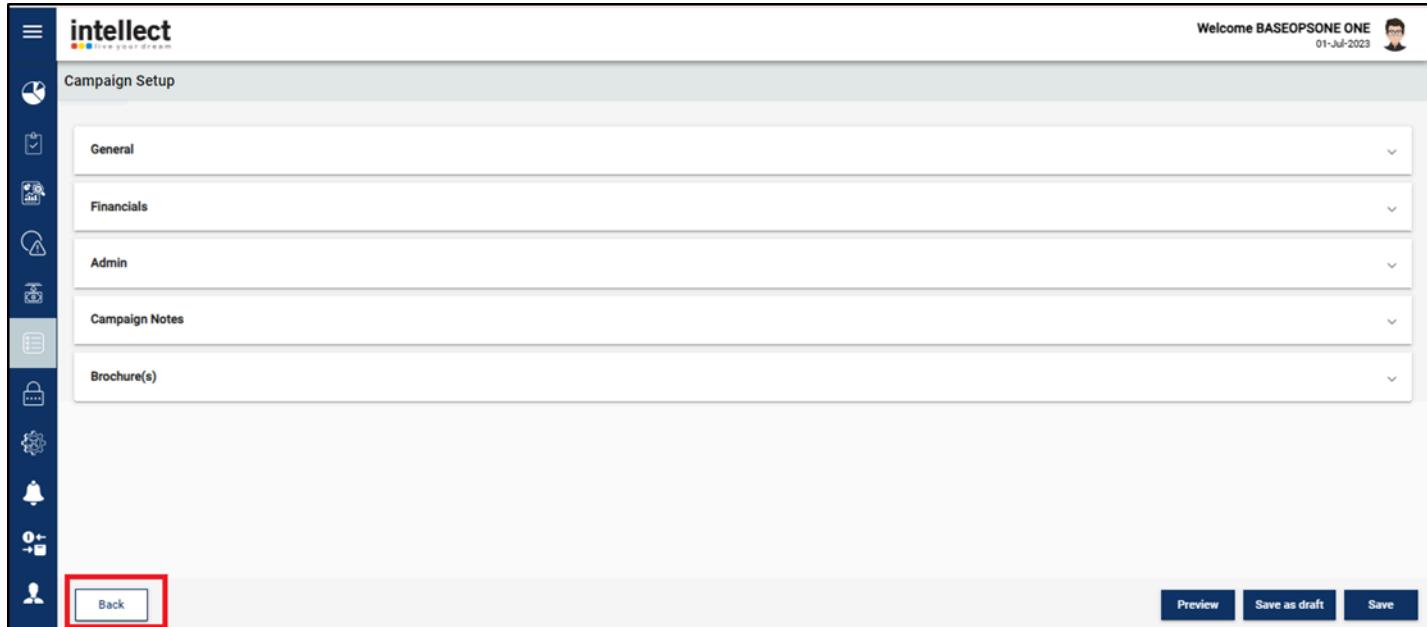
Campaign Setup

Campaign/Event Name	Campaign Type	Campaign/Event Status	Target Response(In %)	Maker Id - Maker Name	Authorizer Id - Authorizer Name	Status	Actions			
HSbc's -Wealth Decoded	Event,Normal	New	100	BASEOPS1-BASEOPSONE ...	-	Modified				
Kmbl	Normal	Active	100	BASEOPS1-BASEOPSONE ...	BASEOPS2-BASEOPSTWO T...	Authorized				
Campaignfor1403	Normal	New	100	BASEOPS1-BASEOPSONE ...	-	Modified				
HSbc	Normal	Active	100	BASEOPS1-BASEOPSONE ...	BASEOPS2-BASEOPSTWO T...	Authorized				
Republic Day Fest	Event,Normal	Active	100	BASEOPS2-BASEOPSTWO ...	-	Modified				
Recollect	Event	Active	100	BASEOPS1-BASEOPSONE ...	BASEOPS2-BASEOPSTWO T...	Authorized				

Back Record Modified Successfully Ok 1 - 6 of 28 | < < > >|

Screen: Save Campaign

- iv. Back- Click on the “Back” button on the subsequent overlay to navigate back to the Campaign Management screen



Campaign Setup

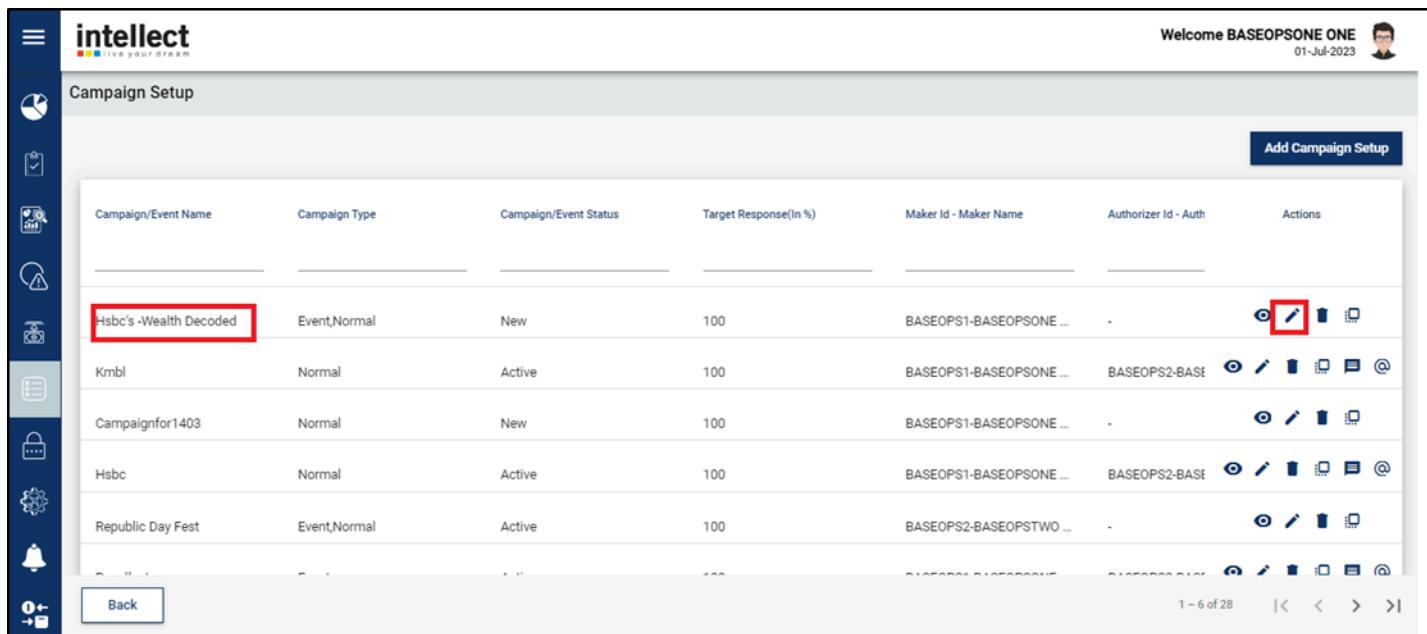
- General
- Financials
- Admin
- Campaign Notes
- Brochure(s)

Back Preview Save as draft Save

Screen: Back to Campaign List

4.3.2 Modify an Existing Campaign

- On the Campaign Management screen, the User clicks on the “Modify” button after selecting a campaign to navigate to the Modify Campaign screen, where they can modify a campaign



Campaign/Event Name	Campaign Type	Campaign/Event Status	Target Response(In %)	Maker Id - Maker Name	Authorizer Id - Auth	Actions
Hsbc's -Wealth Decoded	Event,Normal	New	100	BASEOPS1-BASEOPSONE ...	-	 
Kmbl	Normal	Active	100	BASEOPS1-BASEOPSONE ...	BASEOPS2-BASE ...	 
Campaignfor1403	Normal	New	100	BASEOPS1-BASEOPSONE ...	-	 
Hsbc	Normal	Active	100	BASEOPS1-BASEOPSONE ...	BASEOPS2-BASE ...	 
Republic Day Fest	Event,Normal	Active	100	BASEOPS2-BASEOPSTWO ...	-	 

Screen: Modify an Existing Campaign

2. In the Modify Campaign screen, the User can navigate through the following tabs to capture campaign details:

a. **General** - Modify General information such as Campaign Name, Channel, etc.

Welcome BASEOPSONE ONE
01-Jul-2023

Campaign Setup

General

Campaign/Event Name *	Campaign Name(Local Language)	Campaign Type *	
Campaign Channel *	Campaign/Event ID *	Campaign/Event status	
Target response (in %) 100	Product Type	New	
Security Name	Product Availability	Sub product	
Reward for RM	Mode of Communication *	Reward for Customer	
Objective *		Campaign Performance(in %) 0.00	
Campaign Scheduler			
Campaign Start Date * 01-07-2023	Campaign End Date * 01-07-2023	Campaign Yield Start Date * 01-07-2023	Campaign Yield End Date * 01-07-2023
Broadcast Date & Broadcast Time *		Campaign period (Days) *	
Remarks			

Screen: Modify General Information

b. **Financial** - Modify Financials such as Advertisement and Campaign cost

Welcome BASEOPSONE ONE
01-Jul-2023

Campaign Setup

General

Financials

Type *	Budget *	Actual	Currency *
<input type="checkbox"/> Advertisement Cost	Budget *	Actual	Currency *
<input type="checkbox"/> Campaign Cost			

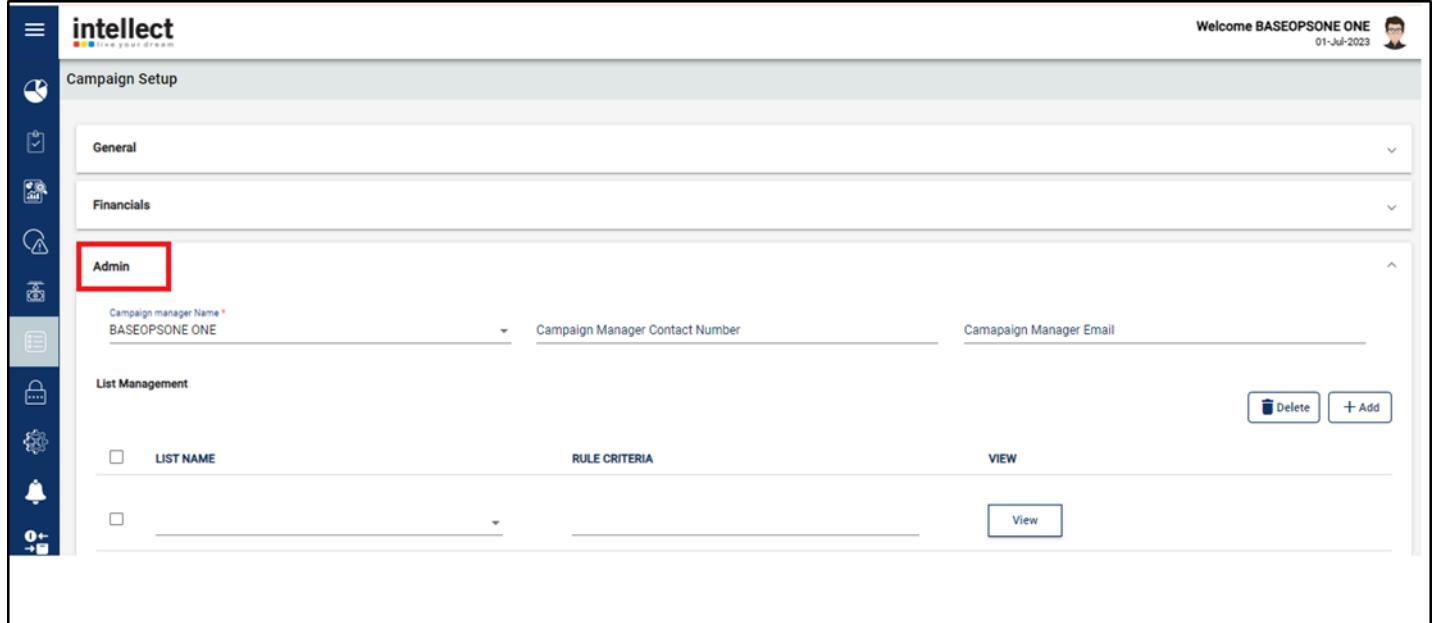
Admin

Campaign Notes

Actions: Delete, Add, Reset, Preview, Save as draft, Save

Screen: Modify Financial Information

c. Admin - Modify Campaign Manager details and selected target list



The screenshot shows the Intellect campaign setup interface. On the left is a vertical toolbar with icons for Home, Campaign Setup, General, Financials, Admin, List Management, Reports, Security, System, and Help. The main area has a header "Welcome BASEOPSONE ONE" with a profile picture and date "01-Jul-2023". The "Admin" tab is selected and highlighted with a red box. Below it, there are fields for "Campaign manager Name" (set to "BASEOPSONE ONE"), "Campaign Manager Contact Number", and "Campaign Manager Email". Under "List Management", there is a table with columns "LIST NAME", "RULE CRITERIA", and "VIEW". A "Delete" button and a "+ Add" button are at the top right of this section.

Screen: Modify Admin details

d. Campaign Notes - Modify content for the Email and/or SMS that will be sent out as part of the campaign



The screenshot shows the Intellect campaign setup interface. The "Admin" tab is selected and highlighted with a red box. Below it, there is a section for "Campaign Notes" with fields for "Subject" and "Signature". There is also a rich text editor toolbar and a text input field "Type Here...". At the bottom, there is a "SMS" field.

Screen: Modify Campaign Notes

e. Brochure - Attach/Remove brochures related to the campaign

Campaign Setup

Brochure(s)

<input type="checkbox"/> Content Type	Order No	Name	Upload	View
<input type="checkbox"/> Attachment	Order Number	<input type="text"/>	<input type="button" value="Choose File"/>	<input type="button" value="View"/>
<input type="checkbox"/> Content				

Attachment

Content

Back

Delete **+ Add**

Reset **Preview** **Save as draft** **Save**

Screen: Attach/Remove Brochures

- f. After the User has modified all relevant details related to the campaign, they can perform the following actions:
- Preview - Click on the “Preview” button to view the Email details related to the campaign

General

Financials

Admin

Campaign Notes

SUBJECT:Test

Subject * Test

Signature * RMS

Best Regards,
RMS

Type Here...

SMS *

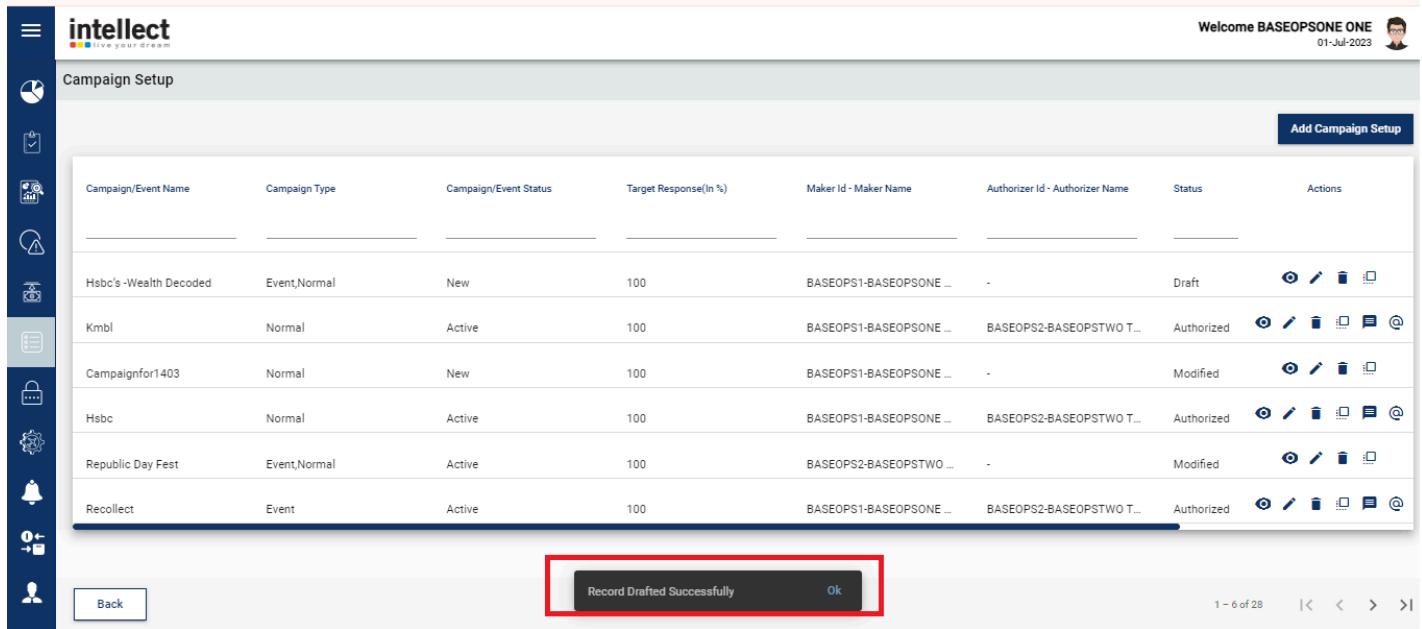
Brochure(s)

Back

Reset **Preview** **Save as draft** **Save**

Screen: Preview Email

- Save as Draft - Click on the “Save as Draft” button to save the campaign in draft mode. The draft can be viewed/modified from the Campaign Management screen

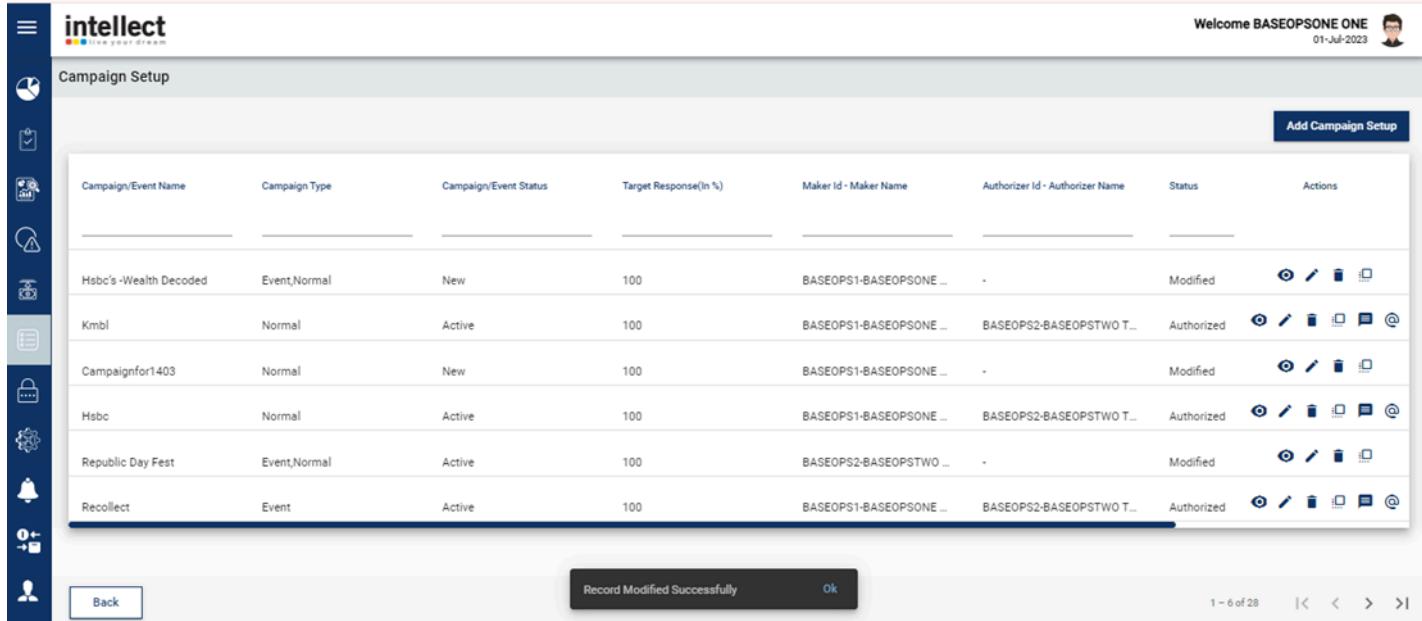


The screenshot shows the 'Campaign Setup' page of the intellect platform. On the left is a vertical sidebar with various icons. The main area displays a table of campaign records. A message box at the bottom center says 'Record Drafted Successfully' with an 'Ok' button. The table has columns: Campaign/Event Name, Campaign Type, Campaign/Event Status, Target Response(in %), Maker Id - Maker Name, Authorizer Id - Authorizer Name, Status, and Actions.

Campaign/Event Name	Campaign Type	Campaign/Event Status	Target Response(in %)	Maker Id - Maker Name	Authorizer Id - Authorizer Name	Status	Actions				
HSbc's -Wealth Decoded	Event,Normal	New	100	BASEOPS1-BASEOPSONE ...	-	Draft					
Kmbl	Normal	Active	100	BASEOPS1-BASEOPSONE ...	BASEOPS2-BASEOPSTWO T...	Authorized					
Campaignfor1403	Normal	New	100	BASEOPS1-BASEOPSONE ...	-	Modified					
HSbc	Normal	Active	100	BASEOPS1-BASEOPSONE ...	BASEOPS2-BASEOPSTWO T...	Authorized					
Republic Day Fest	Event,Normal	Active	100	BASEOPS2-BASEOPSTWO ...	-	Modified					
Recollect	Event	Active	100	BASEOPS1-BASEOPSONE ...	BASEOPS2-BASEOPSTWO T...	Authorized					

Screen: Save as Draft

- Save - Click on the “Save” button to Save the campaign details. After the campaign has been saved, it goes to the Supervisor for Approval



The screenshot shows the 'Campaign Setup' page of the intellect platform. The interface is identical to the previous one, featuring a sidebar with icons and a table of campaign records. A message box at the bottom center says 'Record Modified Successfully' with an 'Ok' button. The table columns are the same as the first screenshot.

Campaign/Event Name	Campaign Type	Campaign/Event Status	Target Response(in %)	Maker Id - Maker Name	Authorizer Id - Authorizer Name	Status	Actions				
HSbc's -Wealth Decoded	Event,Normal	New	100	BASEOPS1-BASEOPSONE ...	-	Modified					
Kmbl	Normal	Active	100	BASEOPS1-BASEOPSONE ...	BASEOPS2-BASEOPSTWO T...	Authorized					
Campaignfor1403	Normal	New	100	BASEOPS1-BASEOPSONE ...	-	Modified					
HSbc	Normal	Active	100	BASEOPS1-BASEOPSONE ...	BASEOPS2-BASEOPSTWO T...	Authorized					
Republic Day Fest	Event,Normal	Active	100	BASEOPS2-BASEOPSTWO ...	-	Modified					
Recollect	Event	Active	100	BASEOPS1-BASEOPSONE ...	BASEOPS2-BASEOPSTWO T...	Authorized					

Screen: Save Campaign

- Back- Click on the “Back” button on the subsequent overlay to navigate back to the Campaign Management screen



Welcome BASEOPSONE ONE
01-Jul-2023

Campaign Setup

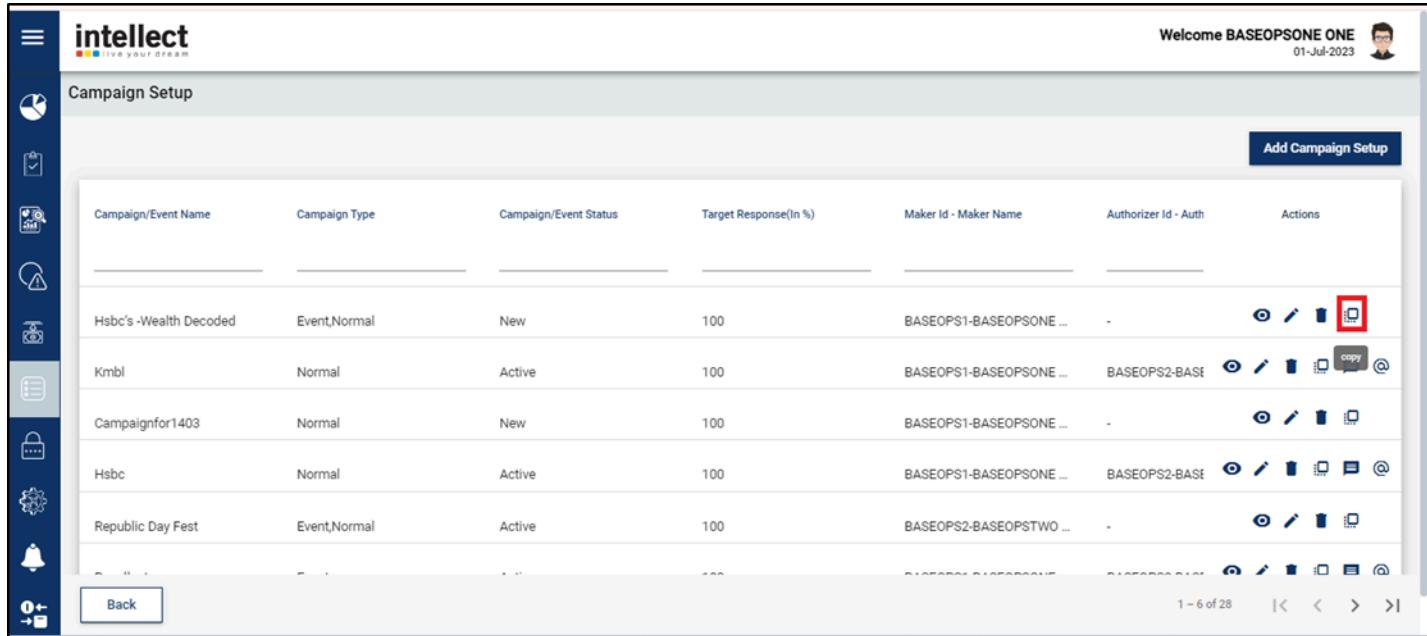
- General
- Financials
- Admin
- Campaign Notes
- Brochure(s)

Back Preview Save as draft Save

Screen: Back to Campaign List

4.3.3 Copy a Campaign

- In the Campaign Management screen, the User clicks on the “Copy” button after selecting a campaign, to navigate to the Copy Campaign screen, where they can copy the details of existing campaigns to create a new campaign



Welcome BASEOPSONE ONE
01-Jul-2023

Campaign Setup

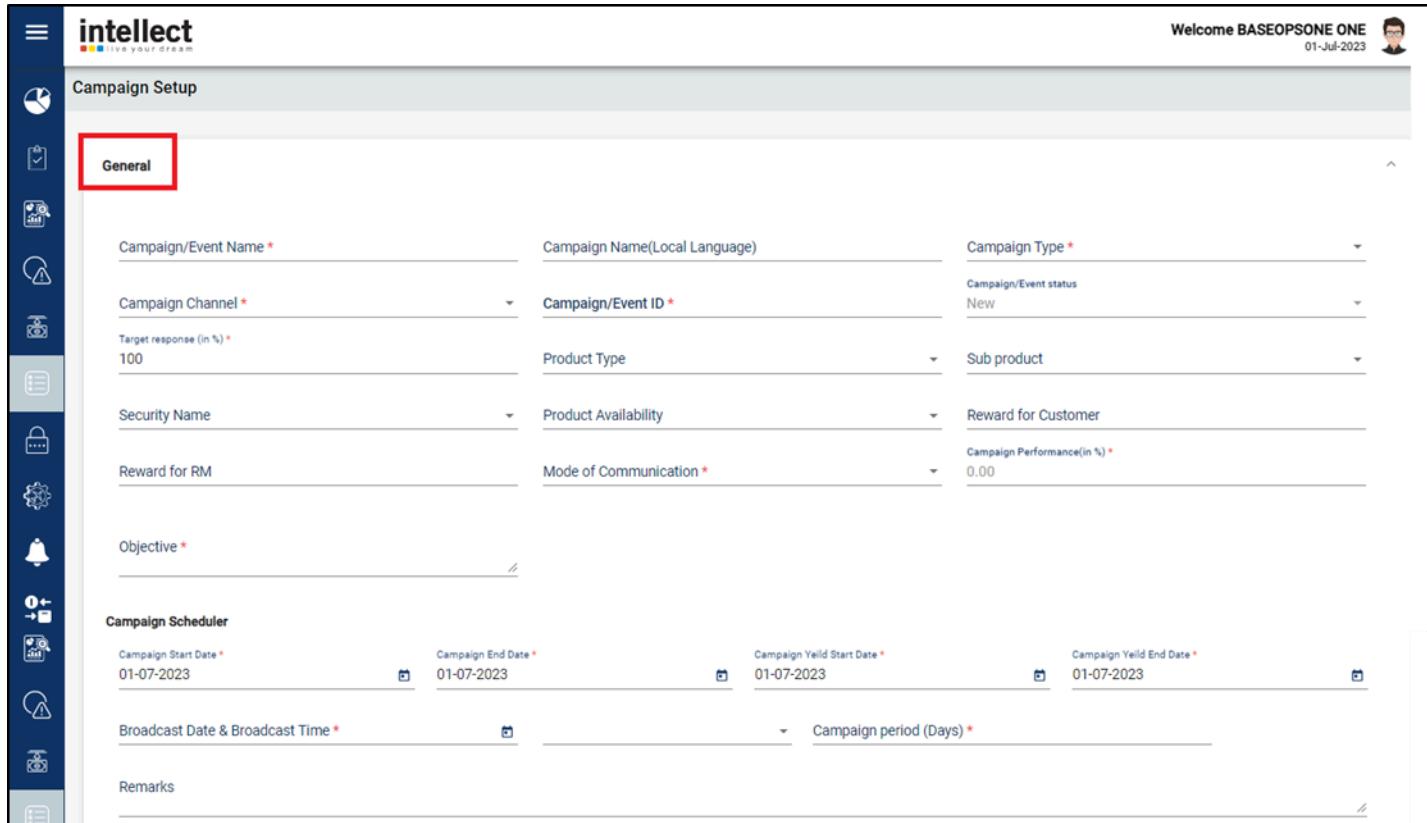
Campaign/Event Name	Campaign Type	Campaign/Event Status	Target Response(In %)	Maker Id - Maker Name	Authorizer Id - Auth	Actions		
Hsbc's -Wealth Decoded	Event,Normal	New	100	BASEOPS1-BASEOPSONE ...	-			
Kmbl	Normal	Active	100	BASEOPS1-BASEOPSONE ...	BASEOPS2-BASE			
Campaignfor1403	Normal	New	100	BASEOPS1-BASEOPSONE ...	-			
Hsbc	Normal	Active	100	BASEOPS1-BASEOPSONE ...	BASEOPS2-BASE			
Republic Day Fest	Event,Normal	Active	100	BASEOPS2-BASEOPSTWO ...	-			

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Screen: Copy an Existing Campaign

- In the Copy Campaign screen, the User can navigate through the following tabs to capture campaign details:

- a. General - Copy/Modify General Information such as Campaign Name, Channel etc.

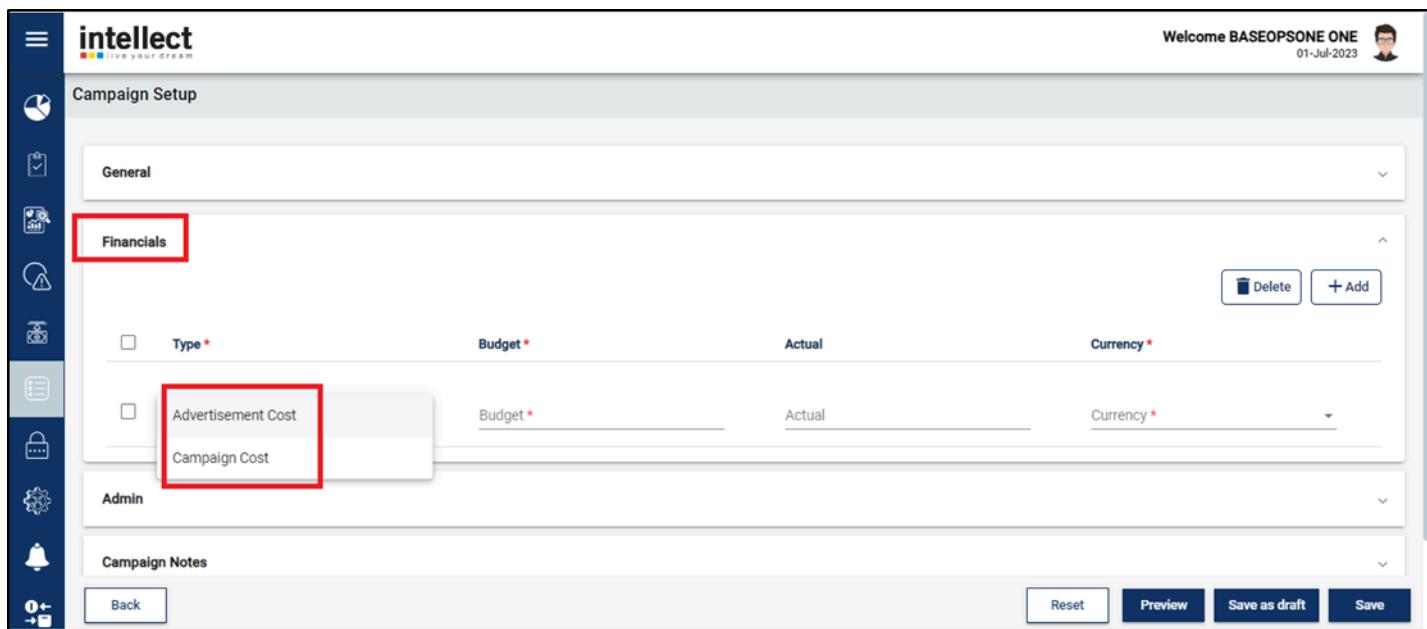


The screenshot shows the 'Campaign Setup' page with the 'General' tab selected. The interface includes a sidebar with various icons and a header with the Intellect logo and user information ('Welcome BASEOPSONE ONE 01-Jul-2023'). The main form contains fields for campaign details like name, type, and objectives, along with a scheduler for start and end dates.

Campaign/Event Name *	Campaign Name(Local Language)	Campaign Type *	
Campaign Channel *	Campaign/Event ID *	Campaign/Event status	
Target response (in %) 100	Product Type	New	
Security Name	Product Availability	Sub product	
Reward for RM	Mode of Communication *	Reward for Customer	
Objective *	Campaign Performance(in %) *		
	0.00		
Campaign Scheduler			
Campaign Start Date * 01-07-2023	Campaign End Date * 01-07-2023	Campaign Yield Start Date * 01-07-2023	Campaign Yield End Date * 01-07-2023
Broadcast Date & Broadcast Time *		Campaign period (Days) *	
Remarks			

Screen: General Information

- b. Financial - Copy/Modify Financials such as Advertisement and Campaign cost



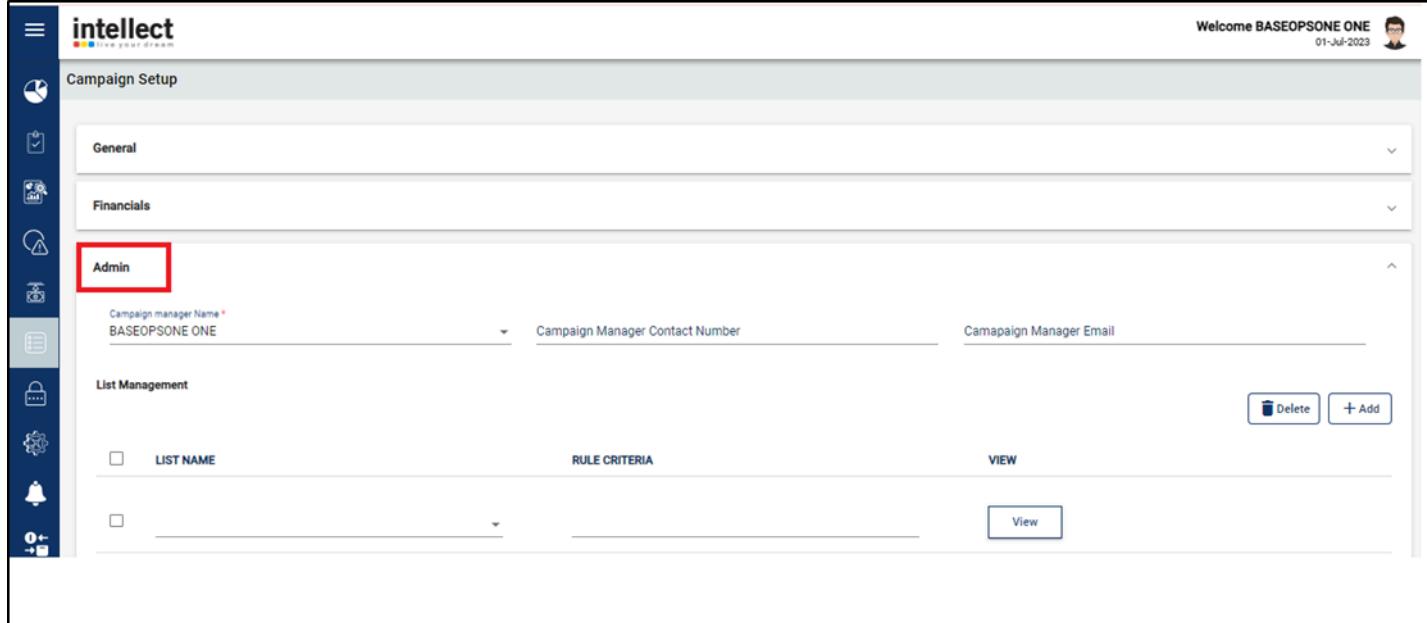
The screenshot shows the 'Campaign Setup' page with the 'Financials' tab selected. The interface includes a sidebar with various icons and a header with the Intellect logo and user information ('Welcome BASEOPSONE ONE 01-Jul-2023'). The main form lists financial types like 'Advertisement Cost' and 'Campaign Cost' with budget and actual values.

Type *	Budget *	Actual	Currency *
Advertisement Cost	Budget *	Actual	Currency *
Campaign Cost			

Buttons at the bottom include 'Delete', '+ Add', 'Reset', 'Preview', 'Save as draft', and 'Save'.

Screen: Financial Information

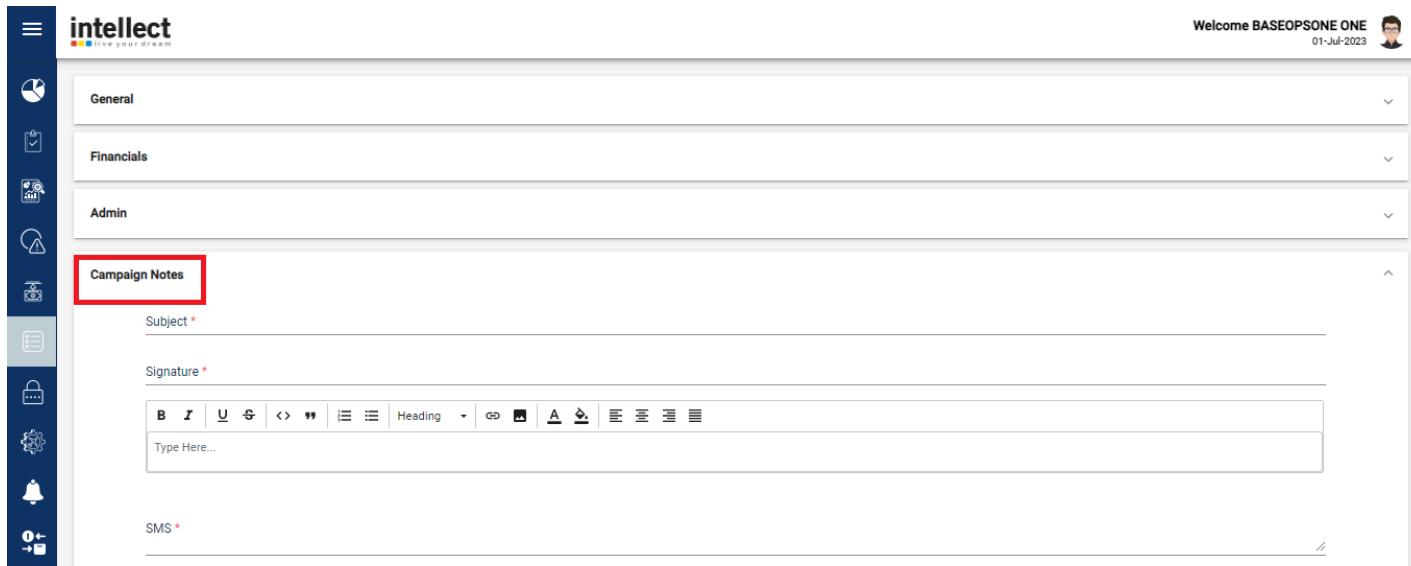
- c. **Admin** - Copy/Modify Campaign Manager details and selected target List



The screenshot shows the Intellect software interface with the title "Screen: Financial Information". On the left is a vertical toolbar with various icons. The main area is titled "Campaign Setup" and contains three tabs: "General", "Financials", and "Admin". The "Admin" tab is highlighted with a red box. It includes fields for "Campaign manager Name" (set to "BASEOPSONE ONE"), "Campaign Manager Contact Number", and "Camapaign Manager Email". Below these fields is a "List Management" section with a table. The table has columns for "LIST NAME", "RULE CRITERIA", and "VIEW". There are two rows in the table. The first row has a checkbox next to "LIST NAME" and a "Delete" button. The second row has a checkbox and a "View" button. At the bottom right of the main area are "Delete" and "+ Add" buttons.

Screen: Admin details

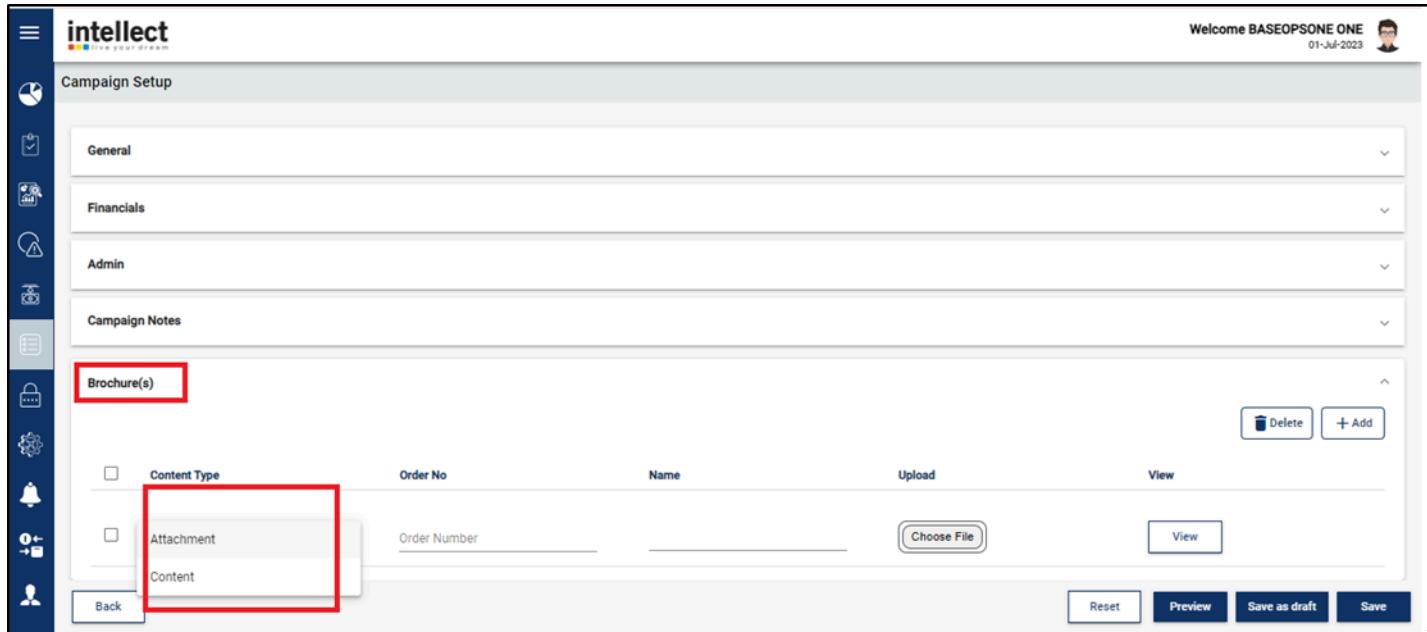
- d. **Campaign Notes** - Copy/Modify content for the Email and/or SMS that will be sent out as part of the campaign



The screenshot shows the Intellect software interface with the title "Screen: Financial Information". On the left is a vertical toolbar with various icons. The main area is titled "Campaign Setup" and contains three tabs: "General", "Financials", and "Admin". The "Admin" tab is highlighted with a red box. It includes a section titled "Campaign Notes". This section has fields for "Subject" and "Signature", both marked with a red asterisk. Below the signature field is a rich text editor toolbar and a text input field containing "Type Here...". At the bottom of the "Campaign Notes" section is a "SMS" field marked with a red asterisk.

Screen: Campaign Notes

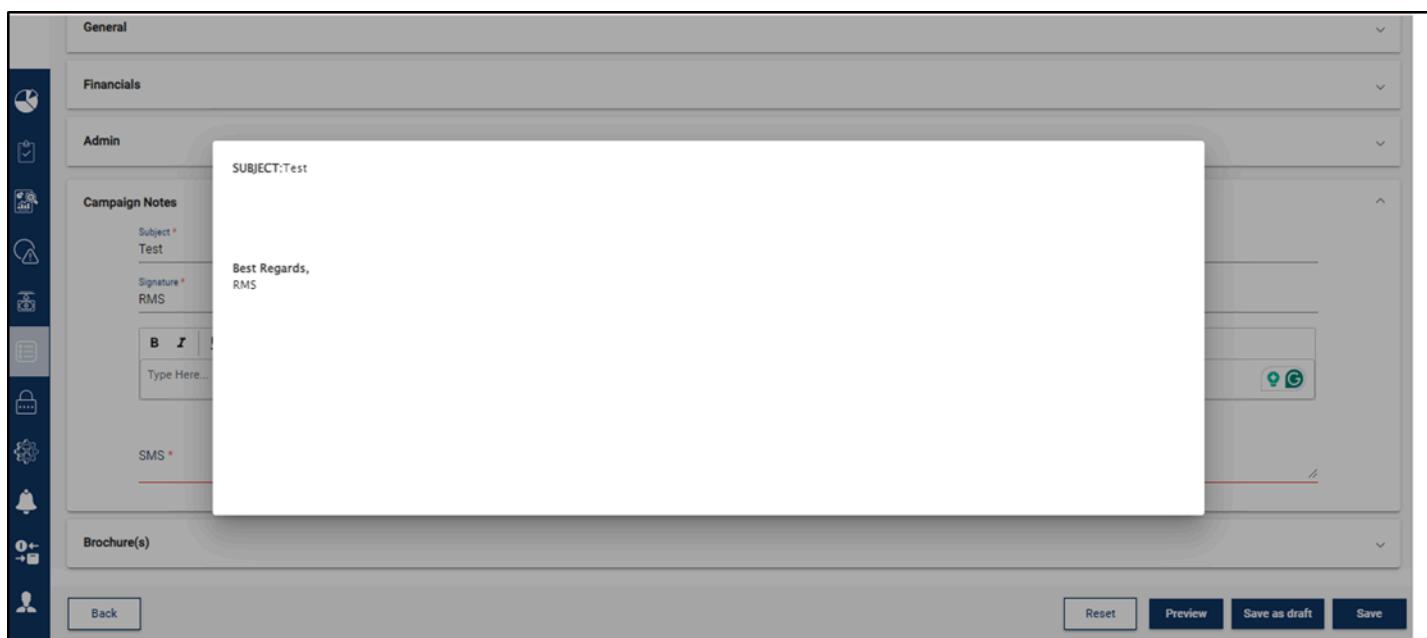
- e. **Brochure** - Attach/Remove brochures related to the campaign



The screenshot shows the 'Campaign Setup' interface. On the left is a vertical toolbar with icons for Home, Campaigns, Financials, Admin, and more. The main area has tabs for General, Financials, Admin, and Campaign Notes. Below these is a section titled 'Brochure(s)' with a red box around it. This section includes a table with columns for Content Type (checkboxes for Attachment and Content), Order No., Name, Upload (with a 'Choose File' button), and View. At the bottom are buttons for Back, Reset, Preview, Save as draft, and Save.

Screen: Attach/Remove Brochures

3. After the User has copied/modified all relevant details related to the campaign, they can perform the following actions:
 - a. **Preview** - Click on the "Preview" button to view the Email details related to the campaign



The screenshot shows the 'Campaign Setup' interface with a preview dialog box overlaid. The dialog contains an email preview with the subject 'SUBJECT:Test' and a signature 'Best Regards, RMS'. The background shows the campaign setup form with sections for General, Financials, Admin, Campaign Notes, and Brochure(s). At the bottom are buttons for Back, Reset, Preview, Save as draft, and Save.

Screen: Preview Email

3. After the User has copied/modified all relevant details related to the campaign, they can perform the following actions:
 - b. **Save as Draft** - Click on the "Save as Draft" button to save the campaign in draft mode. The draft can be viewed/modified from the Campaign Management screen

Campaign Setup

Campaign/Event Name	Campaign Type	Campaign/Event Status	Target Response(In %)	Maker Id - Maker Name	Authorizer Id - Authorizer Name	Status	Actions				
Hsbc's -Wealth Decoded	Event,Normal	New	100	BASEOPS1-BASEOPSONE ...	-	Draft					
Kmbl	Normal	Active	100	BASEOPS1-BASEOPSONE ...	BASEOPS2-BASEOPSTWO T...	Authorized					
Campaignfor1403	Normal	New	100	BASEOPS1-BASEOPSONE ...	-	Modified					
Hsbc	Normal	Active	100	BASEOPS1-BASEOPSONE ...	BASEOPS2-BASEOPSTWO T...	Authorized					
Republic Day Fest	Event,Normal	Active	100	BASEOPS2-BASEOPSTWO ...	-	Modified					
Recollect	Event	Active	100	BASEOPS1-BASEOPSONE ...	BASEOPS2-BASEOPSTWO T...	Authorized					

Record Drafted Successfully Ok

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Screen: Save as Draft

- Save - Click on the “Save” button to Save the campaign details. After the campaign has been saved, it goes to the Supervisor for Approval

Campaign Setup

Campaign/Event Name	Campaign Type	Campaign/Event Status	Target Response(In %)	Maker Id - Maker Name	Authorizer Id - Authorizer Name	Status	Actions				
Hsbc's -Wealth Decoded	Event,Normal	New	100	BASEOPS1-BASEOPSONE ...	-	Modified					
Kmbl	Normal	Active	100	BASEOPS1-BASEOPSONE ...	BASEOPS2-BASEOPSTWO T...	Authorized					
Campaignfor1403	Normal	New	100	BASEOPS1-BASEOPSONE ...	-	Modified					
Hsbc	Normal	Active	100	BASEOPS1-BASEOPSONE ...	BASEOPS2-BASEOPSTWO T...	Authorized					
Republic Day Fest	Event,Normal	Active	100	BASEOPS2-BASEOPSTWO ...	-	Modified					
Recollect	Event	Active	100	BASEOPS1-BASEOPSONE ...	BASEOPS2-BASEOPSTWO T...	Authorized					

Record Modified Successfully Ok

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Screen: Save Campaign

- Back- Click on the “Back” button on the subsequent overlay to navigate back to the Campaign Management screen



Campaign Setup

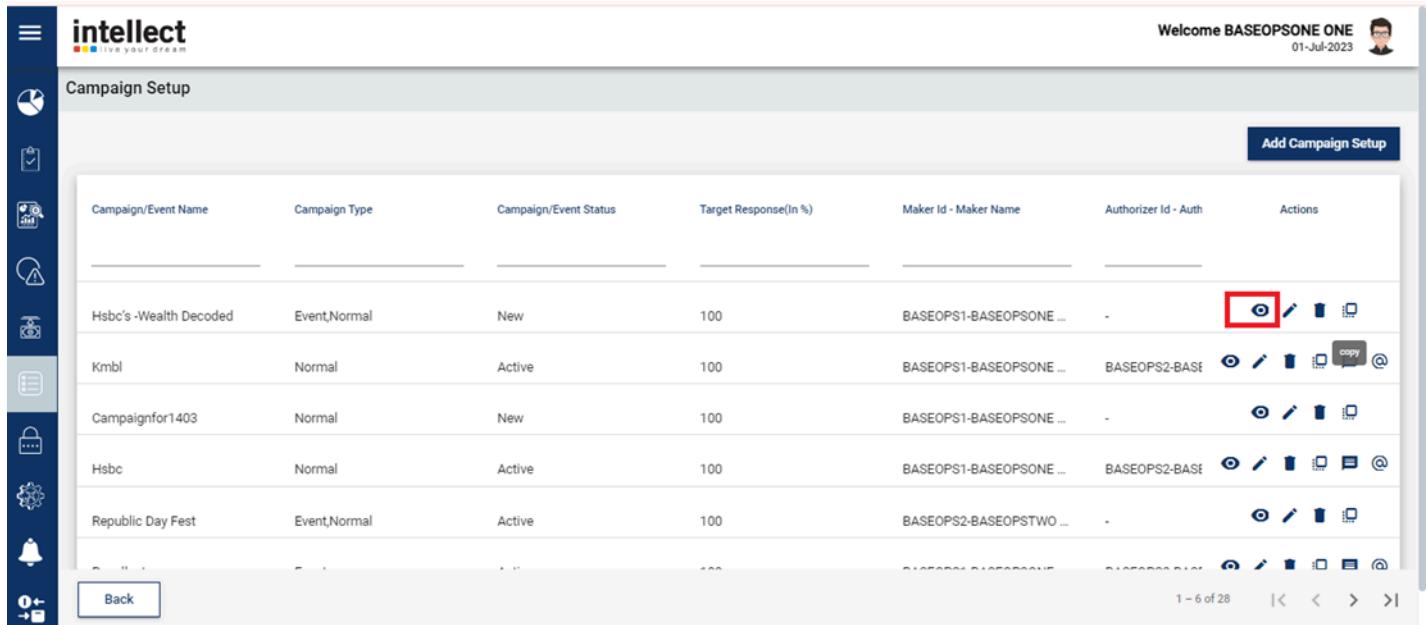
-  General
-  Financials
-  Admin
-  Campaign Notes
-  Brochure(s)

[Back](#) [Preview](#) [Save as draft](#) [Save](#)

Screen: Back to Campaign List

4.3.4 View a Campaign

- In the Campaign Management screen, the User clicks on the “View” button after selecting a campaign, to navigate to the View Campaign screen, where they can view campaign details



Campaign Setup

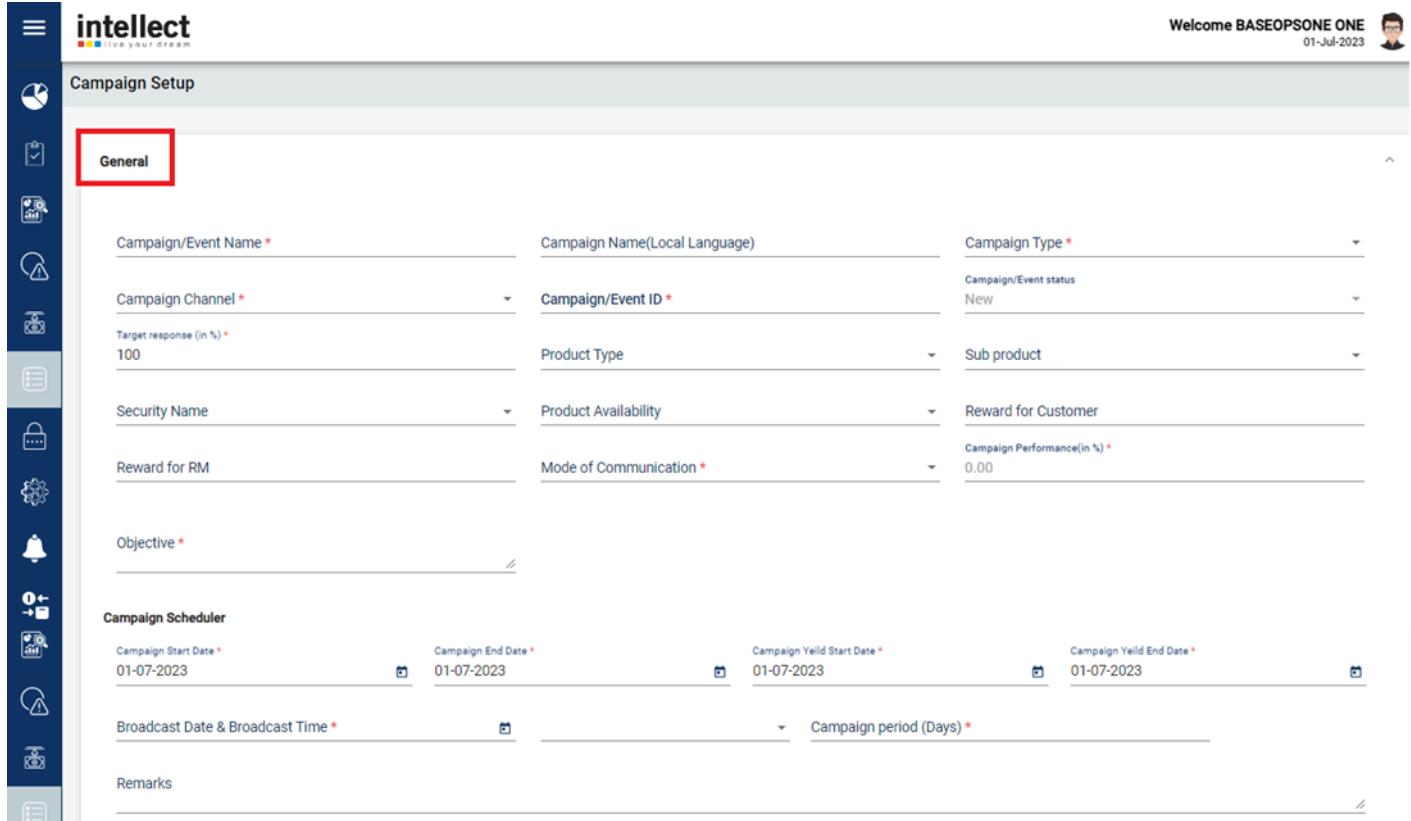
Campaign/Event Name	Campaign Type	Campaign/Event Status	Target Response(in %)	Maker Id - Maker Name	Authorizer Id - Auth	Actions
Hsbc's -Wealth Decoded	Event,Normal	New	100	BASEOPS1-BASEOPSONE ...	-	  
Kmbl	Normal	Active	100	BASEOPS1-BASEOPSONE ...	BASEOPS2-BASE ...	   
Campaignfor1403	Normal	New	100	BASEOPS1-BASEOPSONE ...	-	  
Hsbc	Normal	Active	100	BASEOPS1-BASEOPSONE ...	BASEOPS2-BASE ...	   
Republic Day Fest	Event,Normal	Active	100	BASEOPS2-BASEOPSTWO ...	-	  

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Screen: View Campaign

- On the View Campaign screen, the User can navigate through the following tabs to view campaign details:

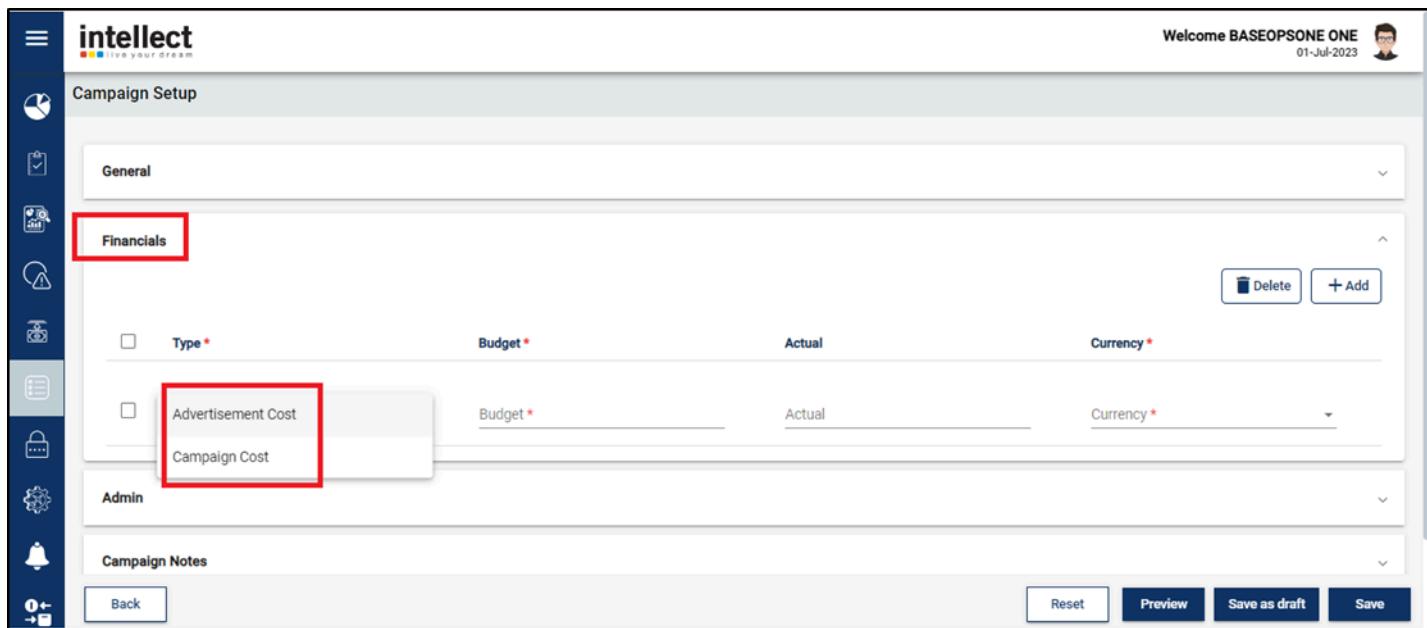
- a. General - View General Information such as Campaign Name, Channel etc.



The screenshot shows the Intellect Campaign Setup interface. On the left is a vertical toolbar with icons for Home, Campaign, Analytics, Security, Budget, Admin, and Help. The main header says "Welcome BASEOPSONE ONE" and "01-Jul-2023". The title "Campaign Setup" is at the top. A red box highlights the "General" tab. Below it, there are several input fields grouped into sections: "Campaign/Event Name *", "Campaign Channel *", "Target response (in %) *", "Security Name", "Reward for RM", "Campaign Name(Local Language)", "Campaign/Event ID *", "Product Type", "Product Availability", "Mode of Communication *", "Campaign Type *", "Campaign/Event status", "Sub product", "Reward for Customer", and "Campaign Performance(in %) *". There is also a section for "Objective *". At the bottom, there are fields for "Campaign Scheduler" (with start and end dates), "Broadcast Date & Broadcast Time *", "Campaign period (Days) *", and "Remarks".

Screen: General Information

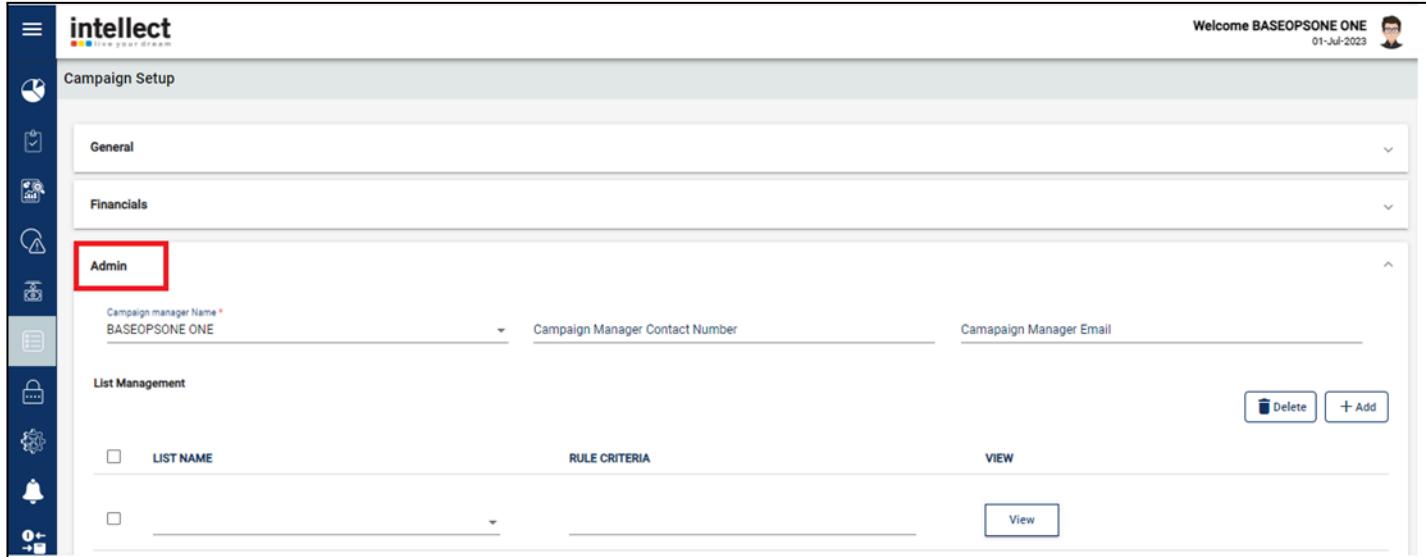
- b. Financial - View Financials such as Advertisement and Campaign cost



The screenshot shows the Intellect Campaign Setup interface with the "Financials" tab selected. The left sidebar has the "Financials" tab highlighted with a red box. The main area displays a table for financial items. The columns are "Type *", "Budget *", "Actual", and "Currency *". Under "Type *", two items are listed: "Advertisement Cost" and "Campaign Cost", which are also highlighted with a red box. To the right of the table are "Delete" and "+ Add" buttons. Below the table, there are sections for "Admin" and "Campaign Notes". At the bottom, there are buttons for "Back", "Reset", "Preview", "Save as draft", and "Save".

Screen: Financial Information

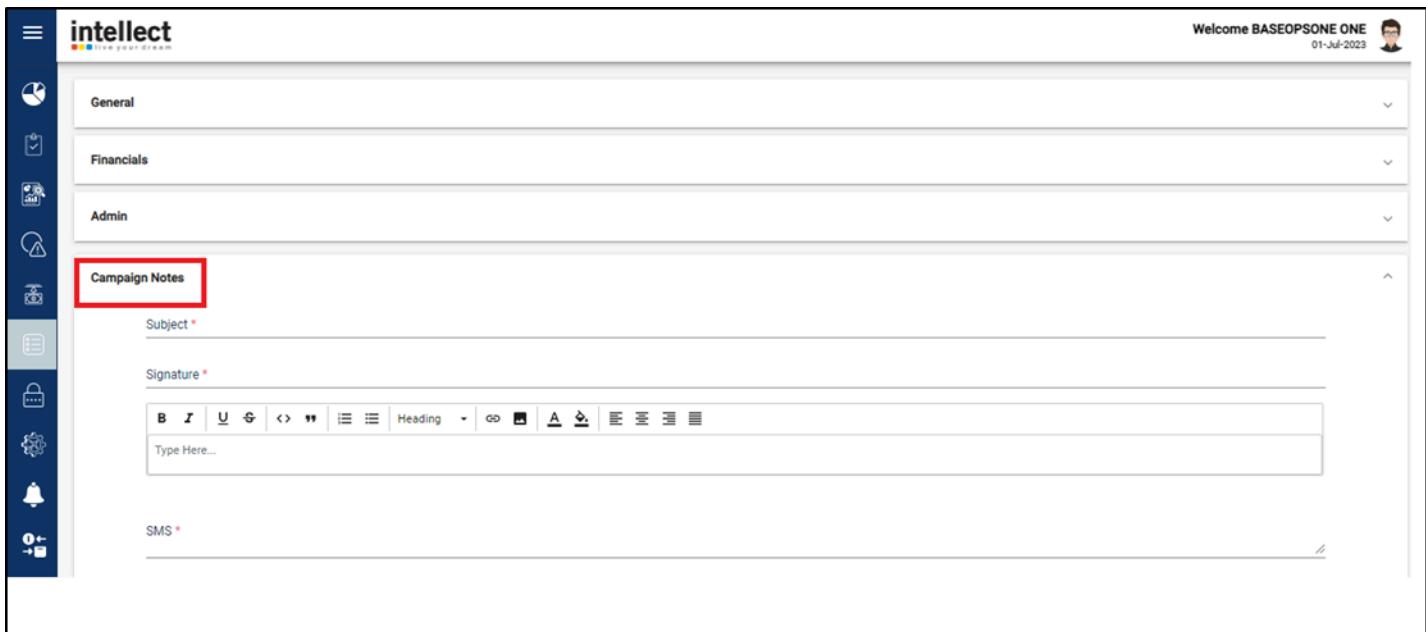
- c. Admin - View Campaign Manager details and selected target List



The screenshot shows the Intellect software interface with the title "intellect" and "Design for Digital". The top right corner displays a welcome message: "Welcome BASEOPSONE ONE" and the date "01-Jul-2023". On the left, there is a vertical sidebar with various icons. The main area is titled "Campaign Setup" and contains three sections: "General", "Financials", and "Admin". The "Admin" section is highlighted with a red box. It includes fields for "Campaign manager Name" (set to "BASEOPSONE ONE"), "Campaign Manager Contact Number", and "Camapaign Manager Email". Below this is a "List Management" section with a table header row containing "LIST NAME", "RULE CRITERIA", and "VIEW". There are two rows of data in the table, each with a checkbox in the first column. The second row has a "View" button. At the bottom right of the screen are "Delete" and "+ Add" buttons.

Screen: Admin details

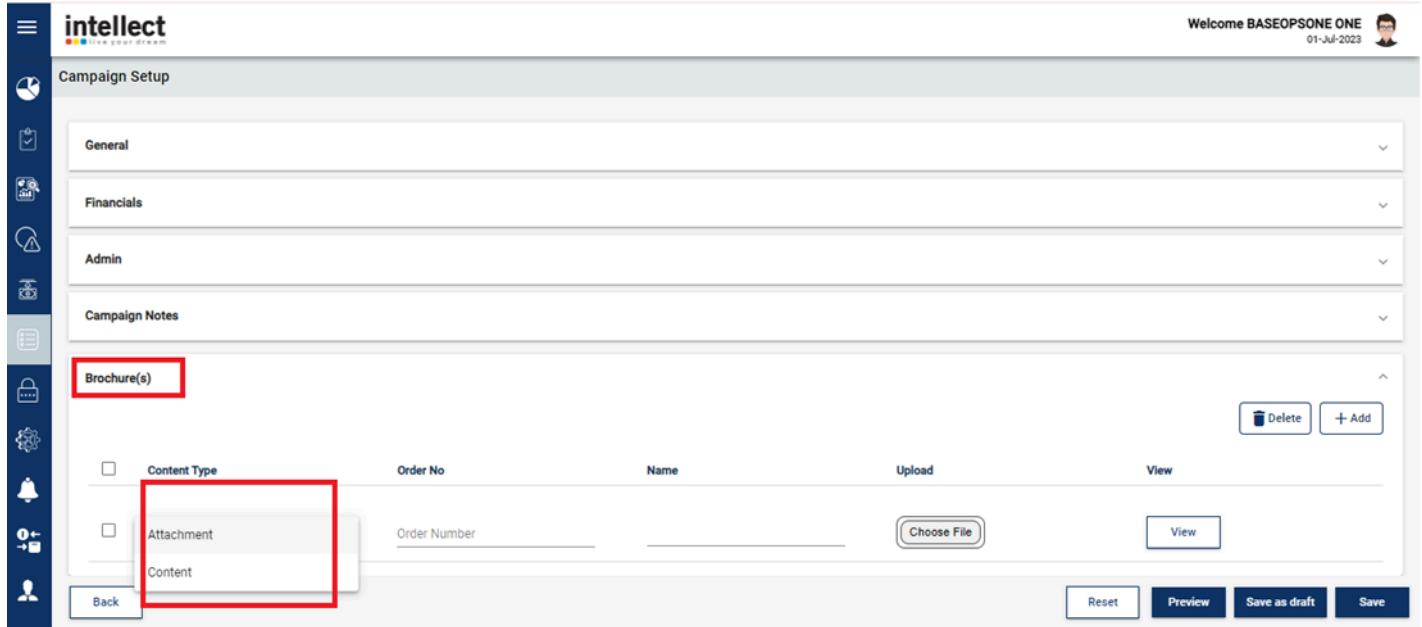
- d. Campaign Notes - View the Email and/or SMS content that will be sent out as part of the campaign



The screenshot shows the Intellect software interface with the title "intellect" and "Design for Digital". The top right corner displays a welcome message: "Welcome BASEOPSONE ONE" and the date "01-Jul-2023". On the left, there is a vertical sidebar with various icons. The main area contains three sections: "General", "Financials", and "Admin". The "Admin" section is expanded. Within the "Admin" section, the "Campaign Notes" section is highlighted with a red box. It includes fields for "Subject" and "Signature". Below these is a rich text editor toolbar with various icons like bold, italic, underline, etc., followed by a text input field with placeholder text "Type Here...". At the bottom of the "Campaign Notes" section is a "SMS" field with a placeholder text "SMS".

Screen: Campaign Notes

- e. Brochure - View brochures related to the campaign



Campaign Setup

General

Financials

Admin

Campaign Notes

Brochure(s)

<input type="checkbox"/> Content Type	Order No	Name	Upload	View
<input type="checkbox"/> Attachment	Order Number	<input type="text"/>	<input type="button" value="Choose File"/>	<input type="button" value="View"/>
<input type="checkbox"/> Content				

Back

Screen: Attach/Remove Brochures

- After the User has viewed all relevant details in the campaign, they can click on the “Back” button to navigate back to the Campaign Management screen



Campaign Setup

General

Financials

Admin

Campaign Notes

Brochure(s)

Back

Screen: Back to Campaign List

4.3.5 Delete a Campaign

- On the Campaign Management screen, the User clicks on the “Delete” button after selecting a campaign, to navigate to the Delete Campaign screen, where they can delete the unauthorized campaigns

Campaign Setup						
						Add Campaign Setup
Campaign/Event Name	Campaign Type	Campaign/Event Status	Target Response(in %)	Maker Id - Maker Name	Authorizer Id - Auth	Actions
Hsbc's -Wealth Decoded	Event,Normal	New	100	BASEOPS1-BASEOPSONE ...	-	 
Kmbl	Normal	Active	100	BASEOPS1-BASEOPSONE ...	BASEOPS2-BASE	  
Campaignfor1403	Normal	New	100	BASEOPS1-BASEOPSONE ...	-	 
Hsbc	Normal	Active	100	BASEOPS1-BASEOPSONE ...	BASEOPS2-BASE	  
Republic Day Fest	Event,Normal	Active	100	BASEOPS2-BASEOPSTWO ...	-	  

Screen: Delete Campaign

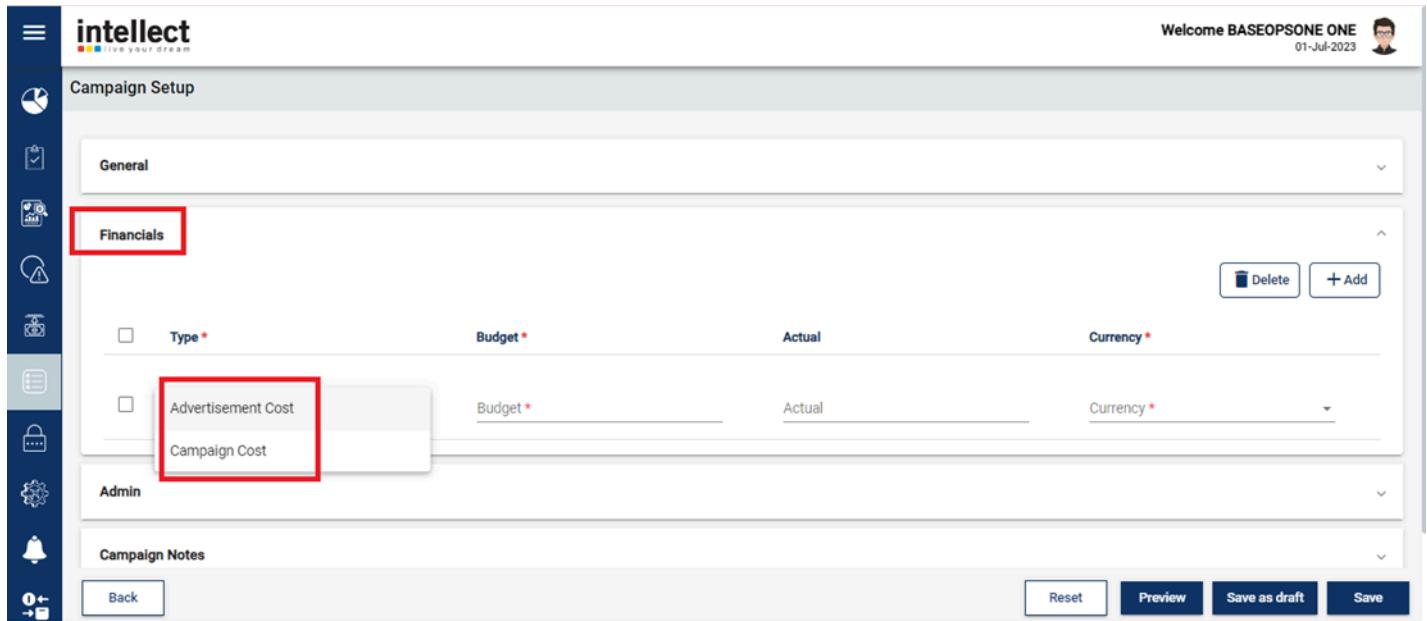
2. On the Delete Campaign screen, the User can navigate through the following tabs to view campaign details:

a. General - View General Information such as Campaign Name, Channel etc.

Campaign Setup						
						Welcome BASEOPSONE ONE 01-Jul-2023
General						
Campaign/Event Name *	Campaign Name(Local Language)		Campaign Type *			
Campaign Channel *	Campaign/Event ID *		Campaign/Event status			
Target response (in %) * 100	Product Type		New			
Security Name	Product Availability		Sub product			
Reward for RM	Mode of Communication *		Reward for Customer			
Objective *			Campaign Performance(in %) * 0.00			
Campaign Scheduler						
Campaign Start Date *	01-07-2023	Campaign End Date *	01-07-2023	Campaign Yield Start Date *	01-07-2023	Campaign Yield End Date *
Broadcast Date & Broadcast Time *			Campaign period (Days) *			
Remarks						

Screen: General Information

- b. **Financial** - View Financials such as Advertisement and Campaign cost



Campaign Setup

General

Financials (highlighted with a red box)

Type *	Budget *	Actual	Currency *
<input type="checkbox"/> Advertisement Cost	<input type="text"/> Budget *	<input type="text"/> Actual	<input type="text"/> Currency *
<input type="checkbox"/> Campaign Cost			

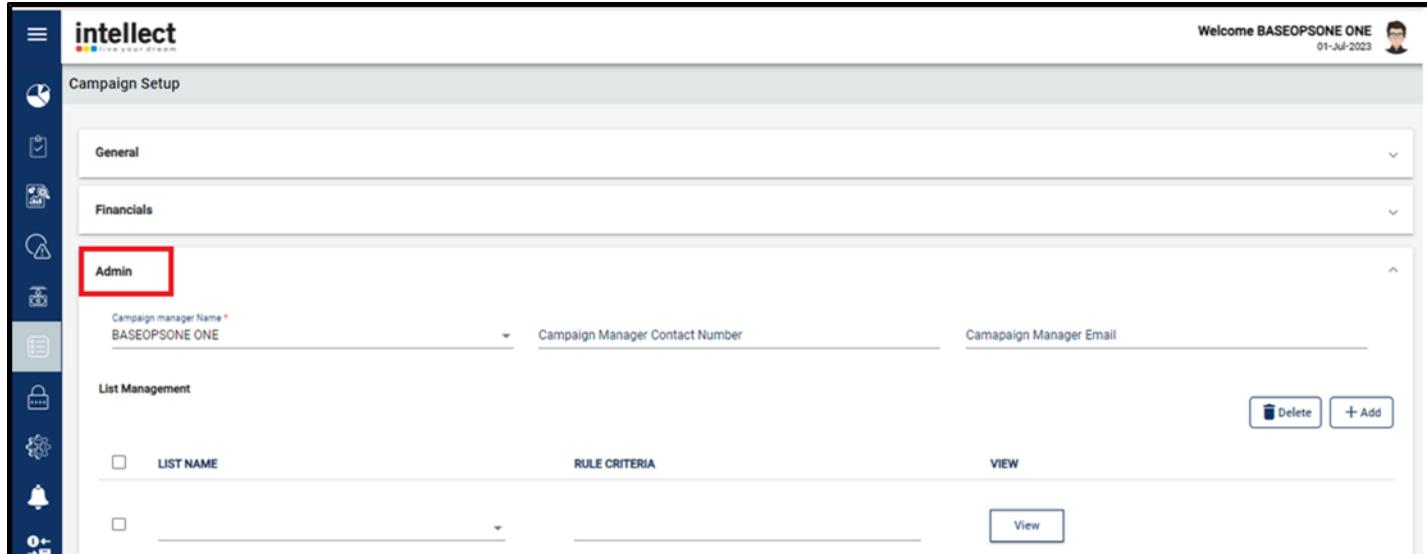
Admin

Campaign Notes

Action Buttons: Back, Reset, Preview, Save as draft, Save

Screen: Financial Information

- c. **Admin** - View Campaign Manager details and selected target List



Campaign Setup

General

Financials

Admin (highlighted with a red box)

Campaign manager Name *	<input type="text"/> BASEOPSONE ONE	Campaign Manager Contact Number	<input type="text"/>	Campaign Manager Email	<input type="text"/>
-------------------------	-------------------------------------	---------------------------------	----------------------	------------------------	----------------------

List Management

<input type="checkbox"/> LIST NAME	RULE CRITERIA	VIEW
<input type="checkbox"/>		<input type="button"/> View

Action Buttons: Delete, + Add

Screen: Admin details

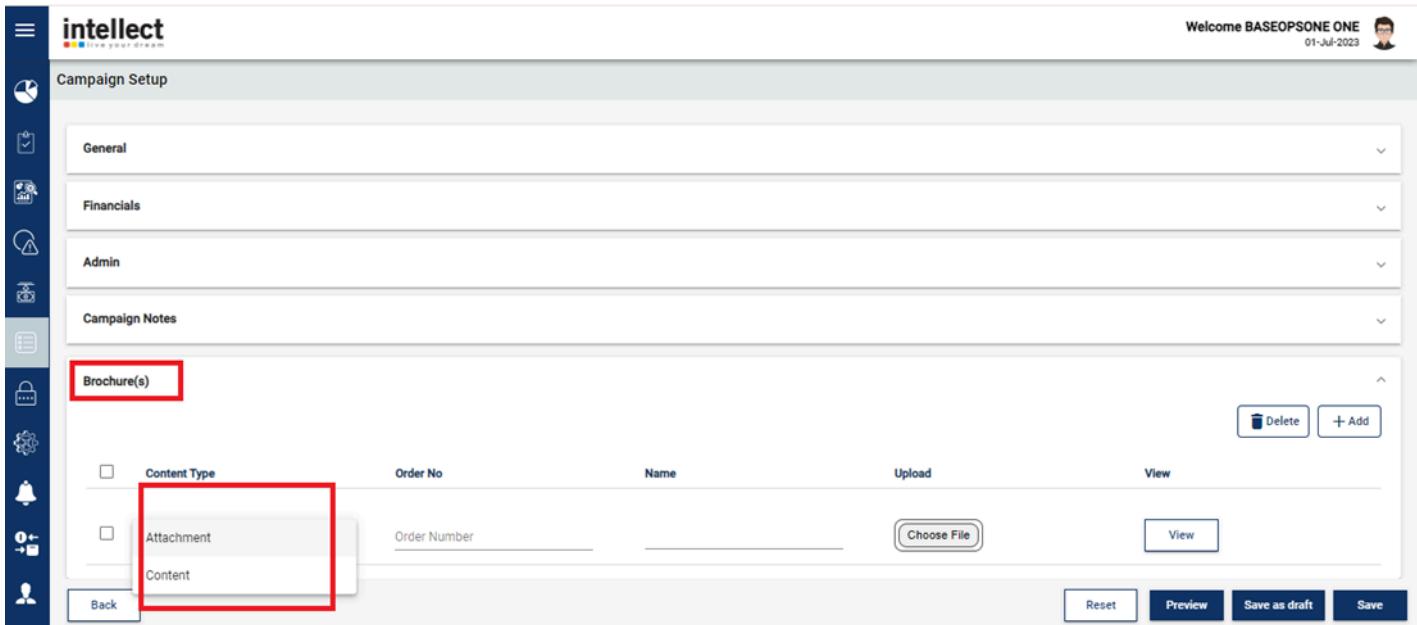
- d. **Campaign Notes** - View the Email and/or SMS content that will be sent out as part of the campaign



The screenshot shows the intellect software interface with a sidebar containing various icons. The main area is titled "Campaign Notes". It includes fields for "Subject *", "Signature *", and "SMS *". A rich text editor toolbar is visible above the signature field. The "Campaign Notes" section is highlighted with a red box.

Screen: Campaign Notes

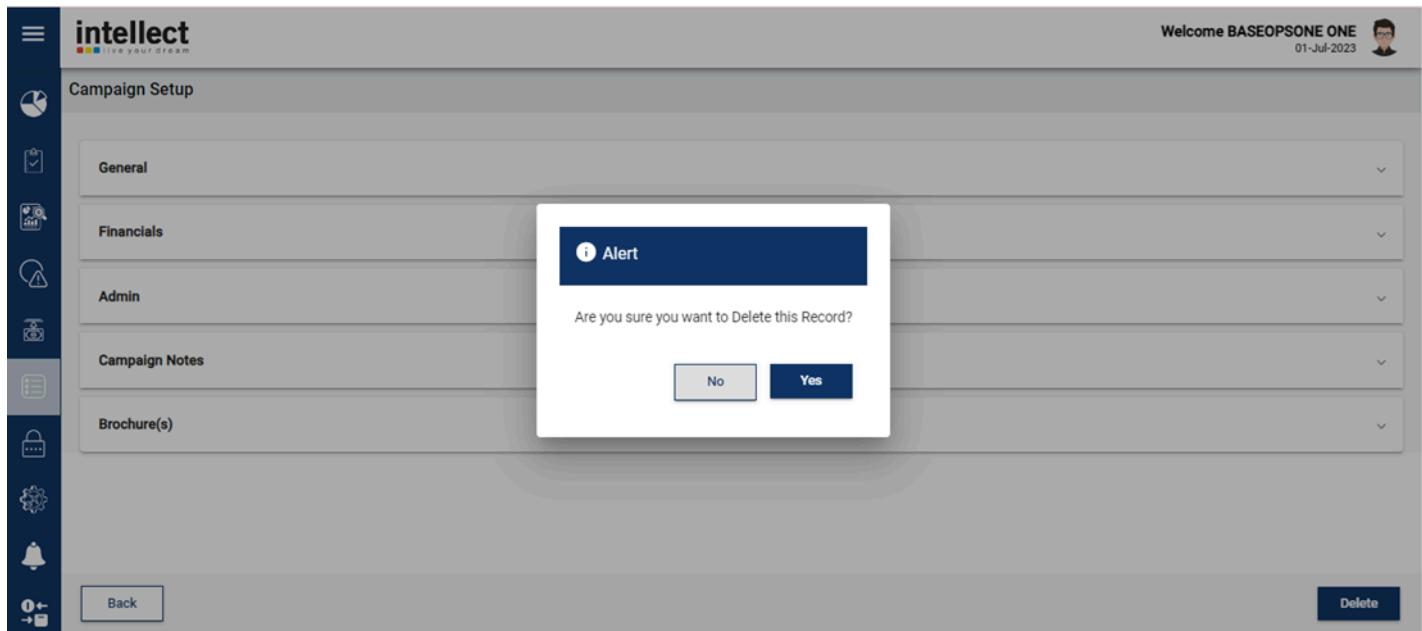
- e. **Brochure** - View brochures related to the campaign



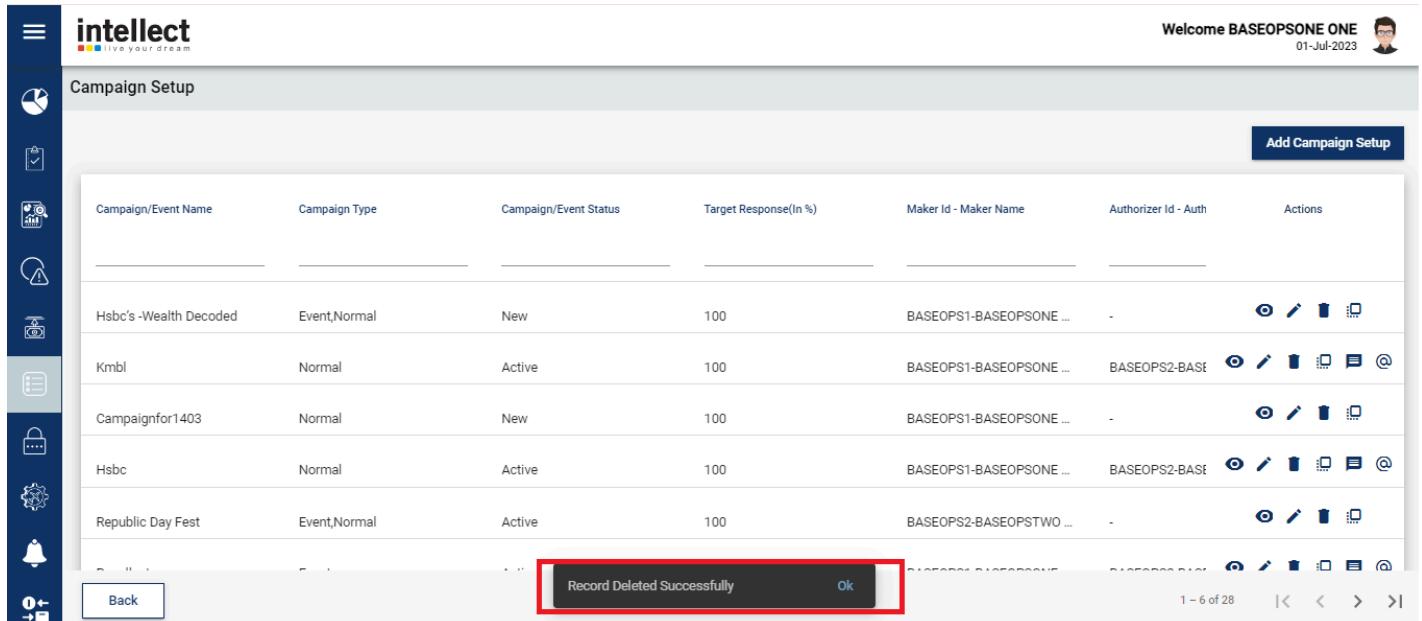
The screenshot shows the intellect software interface with a sidebar containing various icons. The main area is titled "Campaign Setup" and then "Brochure(s)". It lists brochures with columns for "Content Type", "Order No", "Name", "Upload", and "View". A specific row for an attachment is highlighted with a red box. At the bottom, there are buttons for "Delete", "+ Add", "Reset", "Preview", "Save as draft", and "Save".

Screen: Brochures

- f. After the User has viewed all relevant details in the campaign, they can perform the following actions:
 - i. **Delete** - Click on the “Delete” button to delete the campaign. After the Record has been successfully deleted, they can click on the “Ok” button on the overlay to navigate back to the Campaign Management screen



Screen: Delete Campaign



The screenshot shows the 'Campaign Setup' page with an 'Add Campaign Setup' button at the top right. Below is a table of campaign data:

Campaign/Event Name	Campaign Type	Campaign/Event Status	Target Response(In %)	Maker Id - Maker Name	Authorizer Id - Auth	Actions
hsbc's -Wealth Decoded	Event,Normal	New	100	BASEOPS1-BASEOPSONE ...	-	
Kmbl	Normal	Active	100	BASEOPS1-BASEOPSONE ...	BASEOPS2-BASE	
Campaignfor1403	Normal	New	100	BASEOPS1-BASEOPSONE ...	-	
Hsbc	Normal	Active	100	BASEOPS1-BASEOPSONE ...	BASEOPS2-BASE	
Republic Day Fest	Event,Normal	Active	100	BASEOPS2-BASEOPSTWO ...	-	

A red box highlights a success message 'Record Deleted Successfully' with an 'Ok' button. Navigation buttons 'Back' and 'Next' are at the bottom, along with a page number '1 - 6 of 28'.

Screen: Campaign successfully deleted

- ii. Back- Click on the “Back” button on the subsequent overlay to navigate back to the Campaign Management screen

Campaign Setup

Welcome BASEOPS ONE
01-Jul-2023

General

Financials

Admin

Campaign Notes

Brochure(s)

Back

Preview

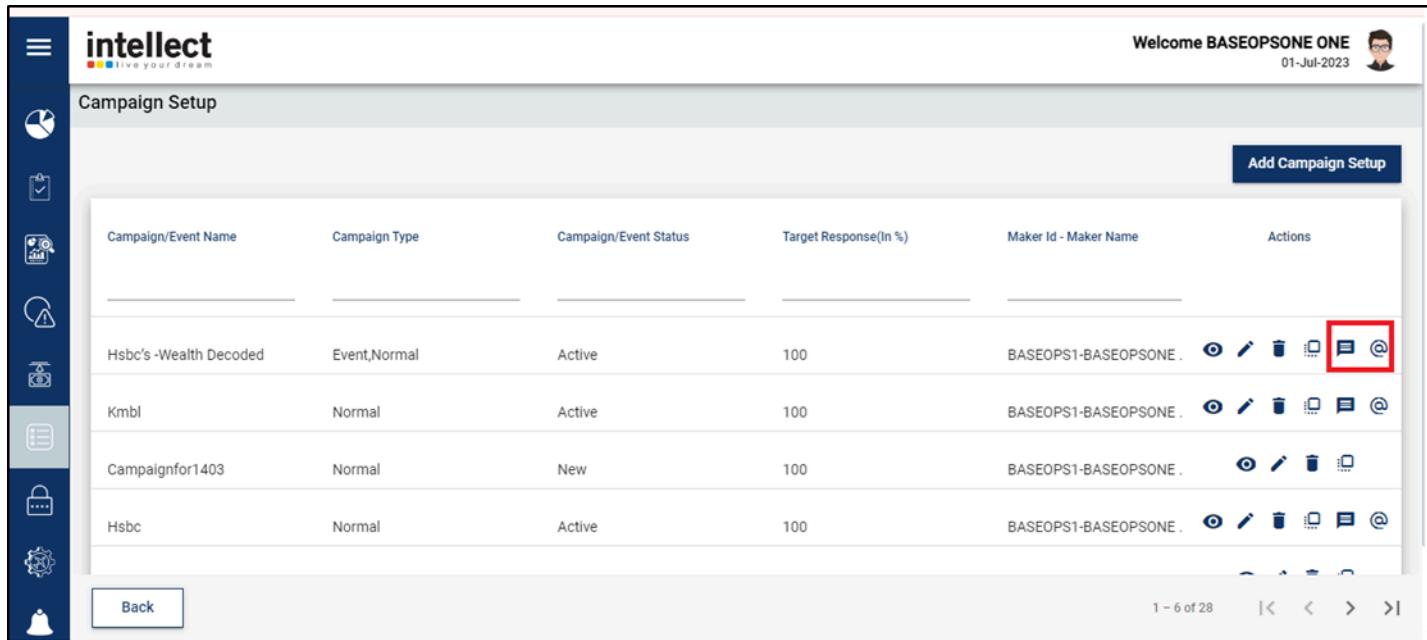
Save as draft

Save

Screen: Back to Campaign List

4.3.6 Campaign Communication

1. Campaign Email/SMS can be broadcasted to the customer during the campaign timeline (Campaign Start Date and End Date included) for active and authorized campaigns by selecting the campaign record and clicking on the respective communication button
2. Email/SMS Communication can be selected by clicking on the Send Mail (Email) and Send SMS (SMS) icons respectively



Campaign/Event Name	Campaign Type	Campaign/Event Status	Target Response(In %)	Maker Id - Maker Name	Actions
HSBC's -Wealth Decoded	Event,Normal	Active	100	BASEOPS1-BASEOPSONE .	
Kmbl	Normal	Active	100	BASEOPS1-BASEOPSONE .	
Campaignfor1403	Normal	New	100	BASEOPS1-BASEOPSONE .	
HSBC	Normal	Active	100	BASEOPS1-BASEOPSONE .	

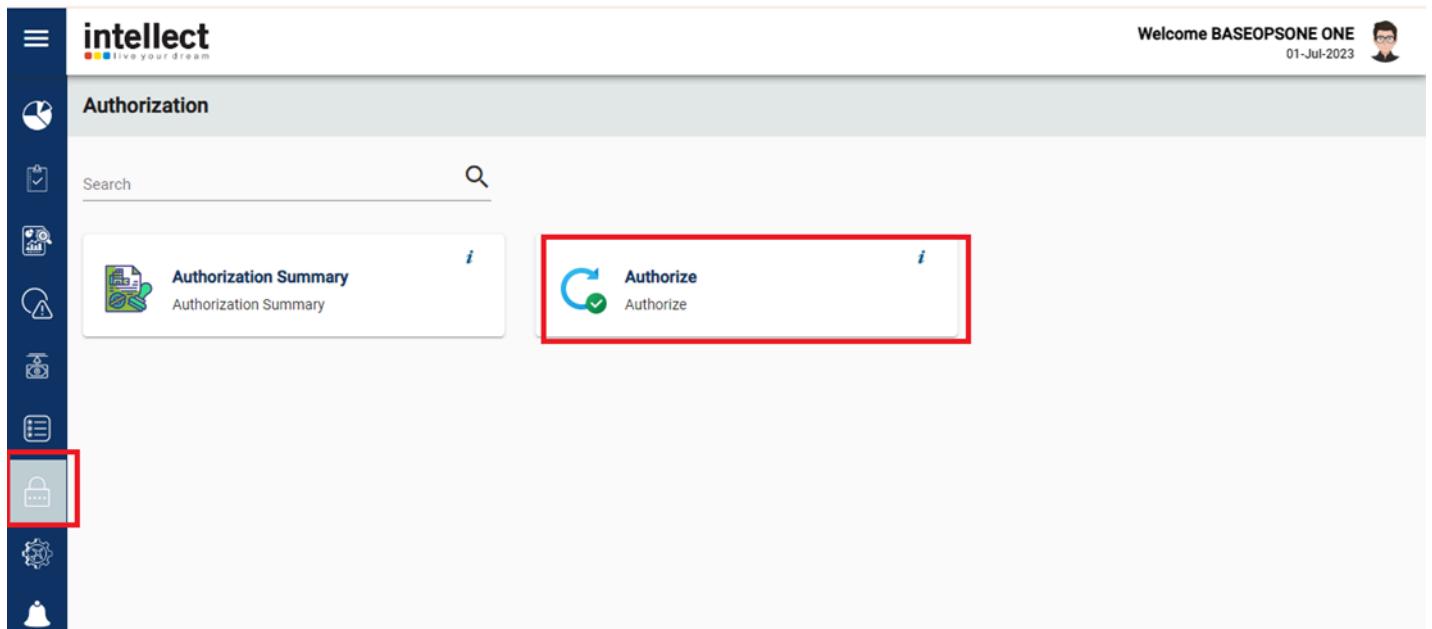
Screen: Campaign Communication – Send Mail/Send SMS

3. Broadcast status will be shown by the system for Send Mail/Send SMS and a pop-up will be displayed as “Email Notification Process Triggered/SMS Notification Process Triggered.”

4.3.7 Supervisor Approval

A Campaign would need to be approved by the Supervisor in the following cases:

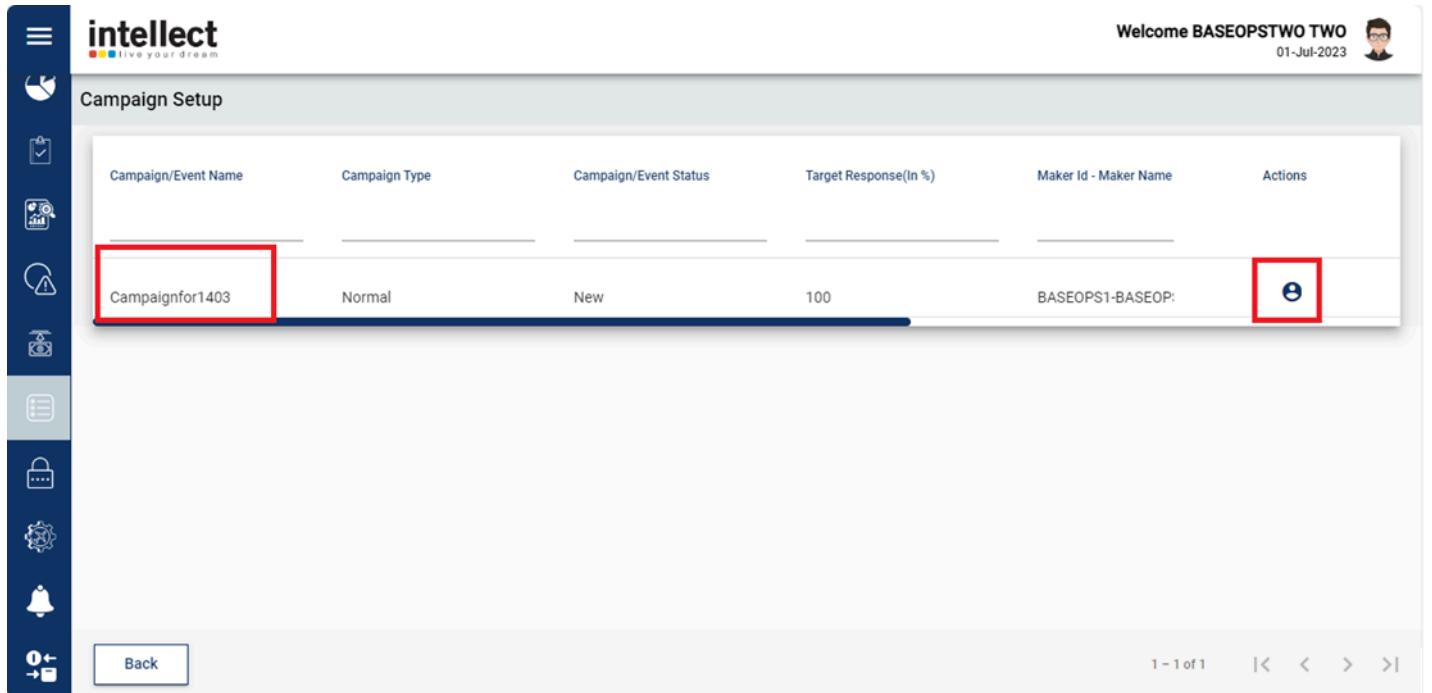
- a. Define a New Campaign
 - b. Modify an Existing Campaign
 - c. Copy a Campaign
1. After logging in, the Supervisor would hover over the “Authorization” menu option and select the “Authorize” sub-menu from the dropdown



The screenshot shows the intellect platform's interface. On the left is a vertical toolbar with various icons. The main header says "Welcome BASEOPSONE ONE" and shows a profile picture. Below the header, the title "Authorization" is displayed. A search bar is present. Two main buttons are shown: "Authorization Summary" and "Authorize". The "Authorize" button is highlighted with a red box. At the bottom of the screen, there is a navigation bar with icons for Back, Forward, and Home.

Screen: Click on Authorize

- Once on the Authorize screen, the Supervisor then needs to select the “Campaign Management” option from the Authorize Unit dropdown to navigate to the Authorize Campaign screen

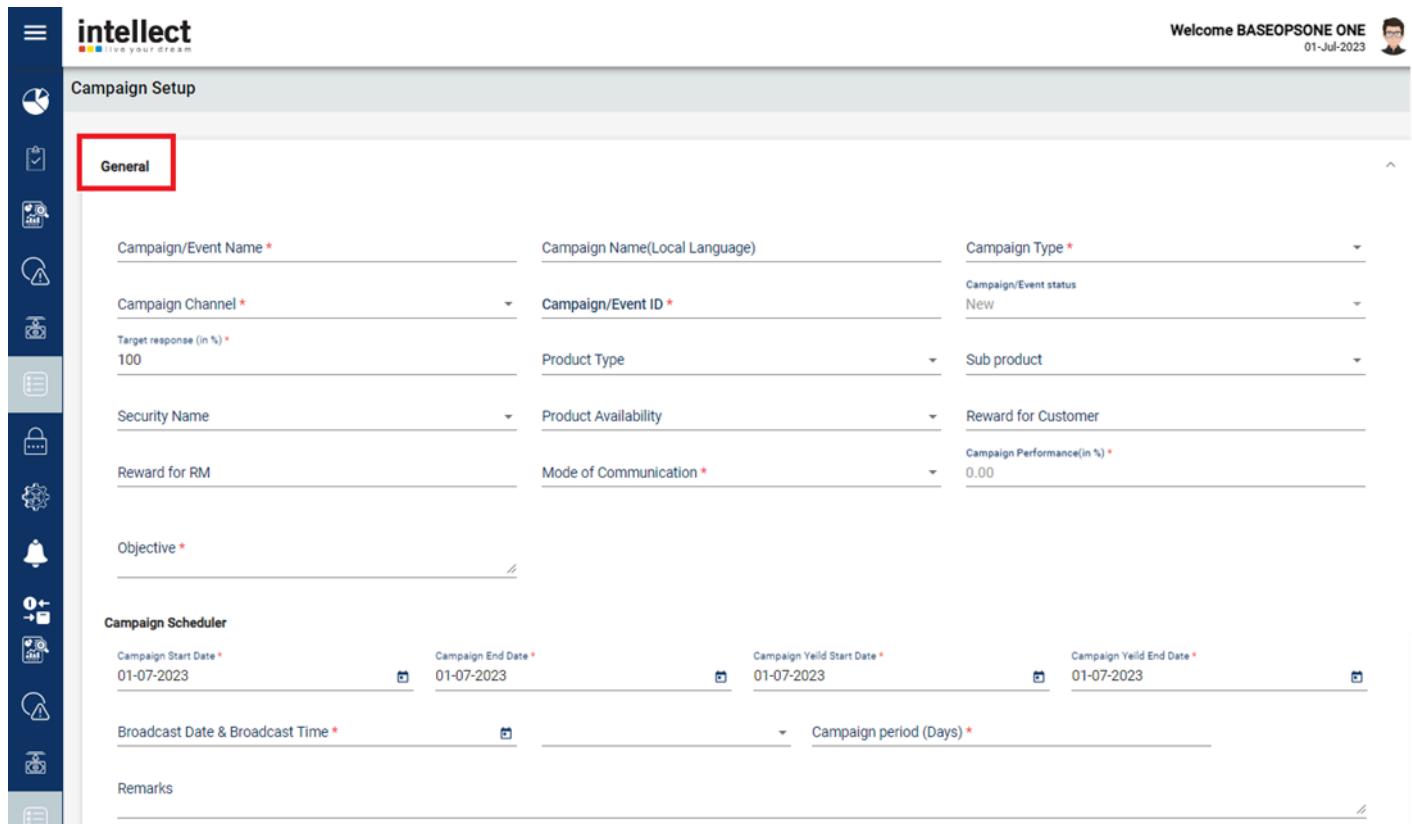


The screenshot shows the intellect platform's interface. On the left is a vertical toolbar with various icons. The main header says "Welcome BASEOPSTWO TWO" and shows a profile picture. Below the header, the title "Campaign Setup" is displayed. A table lists campaign details: Campaign/Event Name (Campaignfor1403), Campaign Type (Normal), Campaign/Event Status (New), Target Response(In %) (100), Maker Id - Maker Name (BASEOPS1-BASEOP), and Actions (an edit icon). The "Actions" column for the first row is highlighted with a red box. At the bottom of the screen, there is a navigation bar with icons for Back, Forward, and Home.

Screen: Select Campaign Management

3. The Supervisor can select any Campaign and click on the “Authorize/Reject” button to view the selected campaign details and Authorize/Reject the same

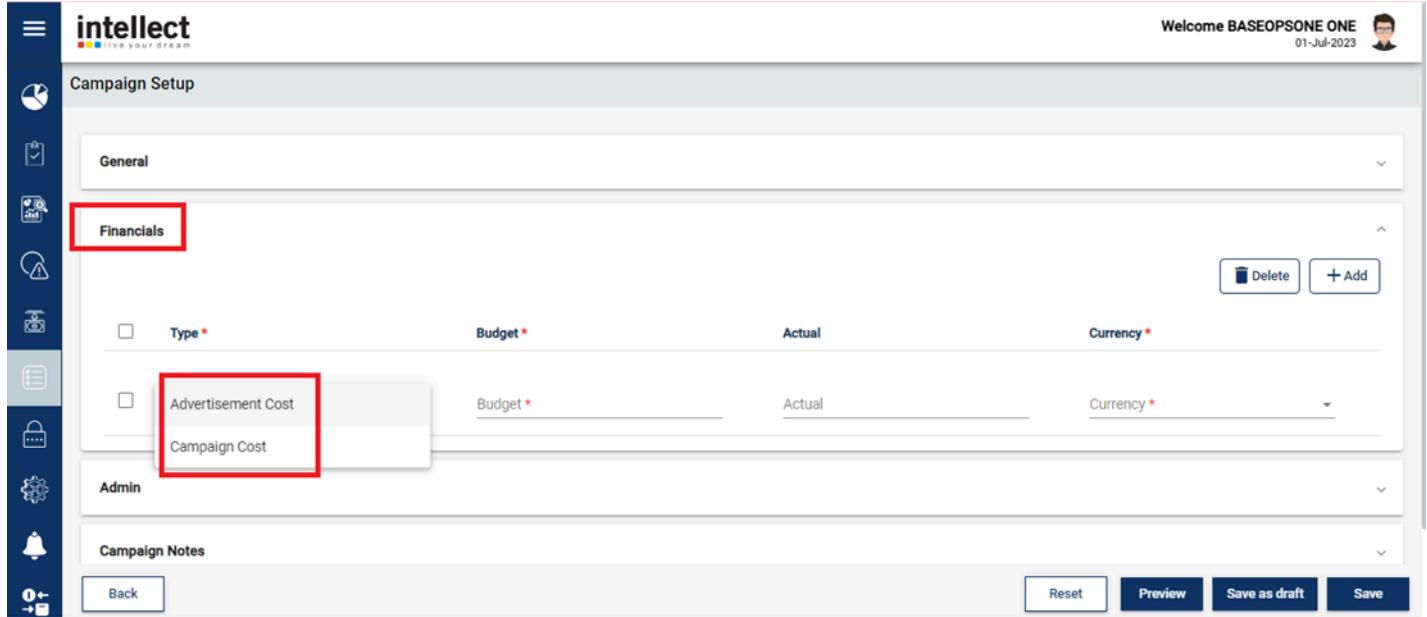
4. Once on the Authorize Campaign screen, the Supervisor can navigate through the following tabs to view details:
 - a. **General** - View General Information such as Campaign Name, Channel etc.



The screenshot shows the Intellect Campaign Setup interface. On the left is a vertical toolbar with various icons. The main area is titled "Campaign Setup" and has a sub-section titled "General". A red box highlights the "General" tab. Below it, there are several input fields and dropdown menus for campaign details like name, channel, type, and status. Another section titled "Campaign Scheduler" includes date pickers for start and end dates. At the bottom, there's a "Remarks" field and a "Screen: Campaign General Details" label.

Campaign/Event Name *	Campaign Name(Local Language)	Campaign Type *
Campaign Channel *	Campaign/Event ID *	Campaign/Event status
Target response (in %) *	Product Type	New
100		Sub product
Security Name	Product Availability	Reward for Customer
Reward for RM	Mode of Communication *	Campaign Performance(in %) *
Objective *		
Campaign Scheduler Campaign Start Date * 01-07-2023 Campaign End Date * 01-07-2023 Campaign Yield Start Date * 01-07-2023 Campaign Yield End Date * 01-07-2023 Broadcast Date & Broadcast Time * Campaign period (Days) *		
Remarks		

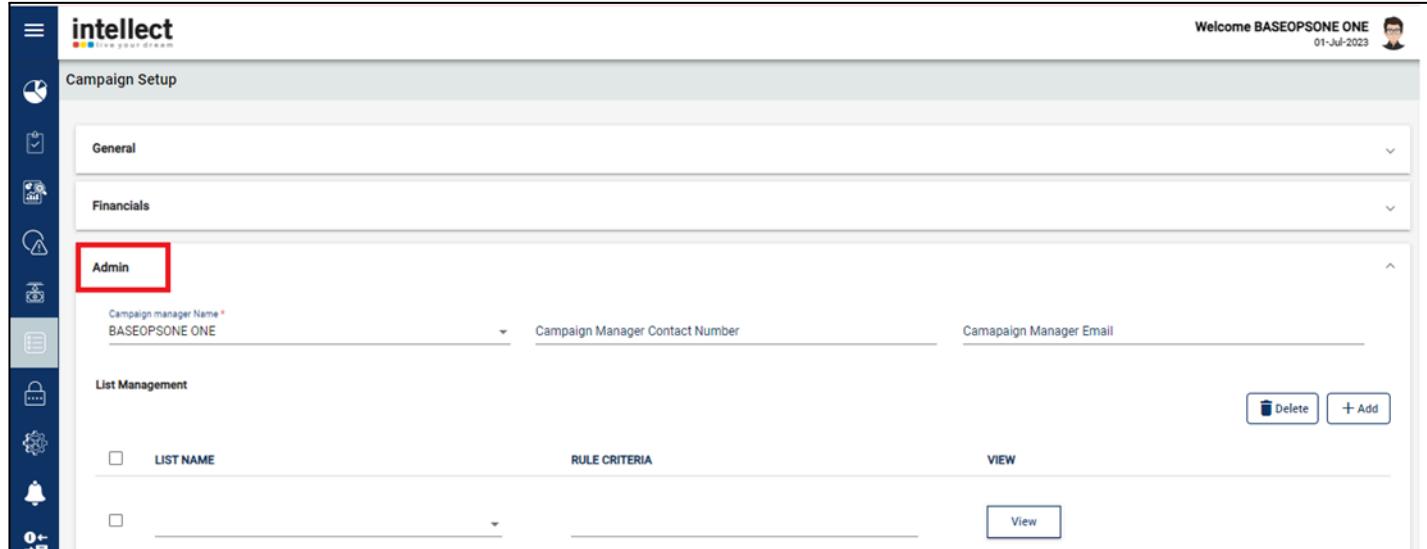
- b. **Financial** - View Financials such as Advertisement and Campaign cost



The screenshot shows the 'Campaign Setup' interface. On the left is a vertical toolbar with icons for Home, Campaign, Lead, Opportunity, Task, Note, and Help. The main area has tabs: 'General' (selected), 'Financials' (highlighted with a red box), 'Admin', and 'Campaign Notes'. Under 'Financials', there's a table for 'Advertisement Cost' and 'Campaign Cost' with columns for Type*, Budget*, Actual, and Currency*. Buttons for 'Delete' and '+ Add' are at the top right. At the bottom are buttons for 'Reset', 'Preview', 'Save as draft', and 'Save'.

Screen: Campaign Financials

c. Admin - View Campaign Manager details and selected target List



The screenshot shows the 'Campaign Setup' interface. The left toolbar is identical to the previous screen. The main area has tabs: 'General', 'Financials', 'Admin' (highlighted with a red box), and 'List Management'. Under 'Admin', fields include 'Campaign manager Name*' (set to 'BASEOPSONE ONE'), 'Campaign Manager Contact Number', and 'Camapaign Manager Email'. Under 'List Management', there's a table for 'LIST NAME' with columns for RULE CRITERIA and VIEW. Buttons for 'Delete' and '+ Add' are at the top right. At the bottom are buttons for 'View'.

Screen: Campaign Admin details

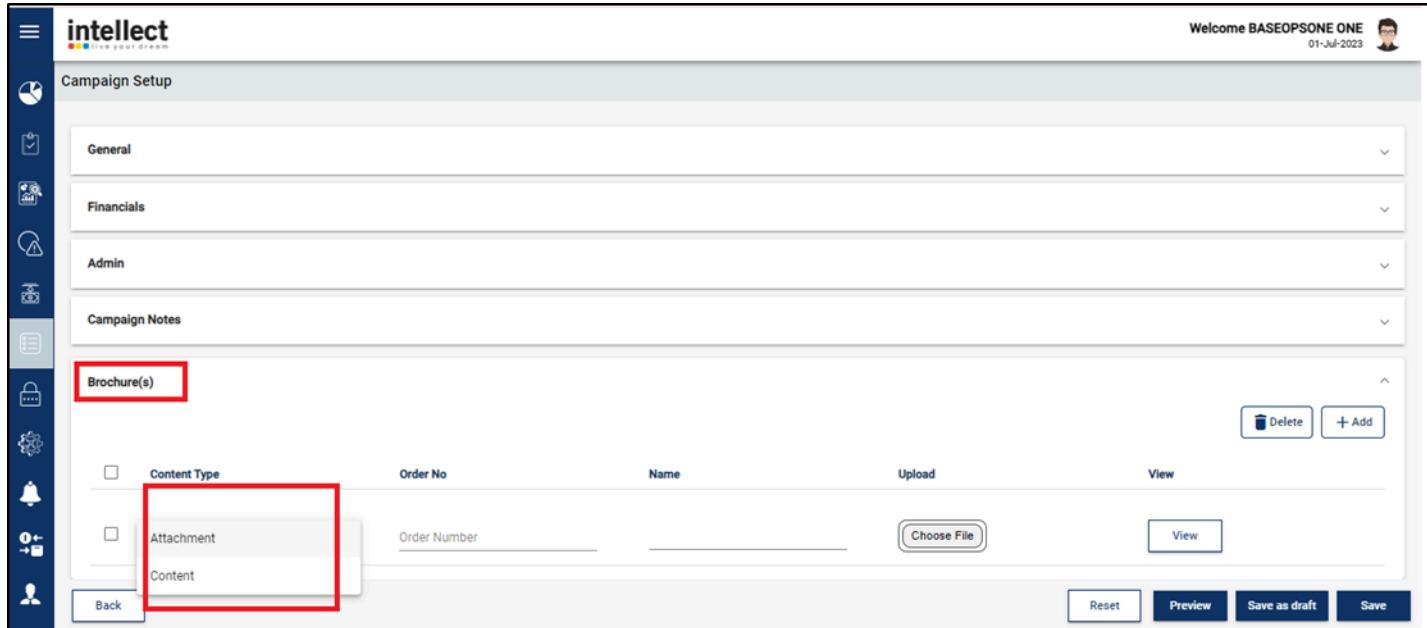
d. Campaign Notes - View content for the Email and/or SMS that will be sent out as part of the campaign



The screenshot shows the Intellect software interface with a sidebar containing various icons. The main area displays a 'Campaign Notes' form. The 'Campaign Notes' section is highlighted with a red box. The form includes fields for 'Subject *', 'Signature *', and 'SMS *'. A rich text editor toolbar is visible above the signature field.

Screen: Campaign Notes

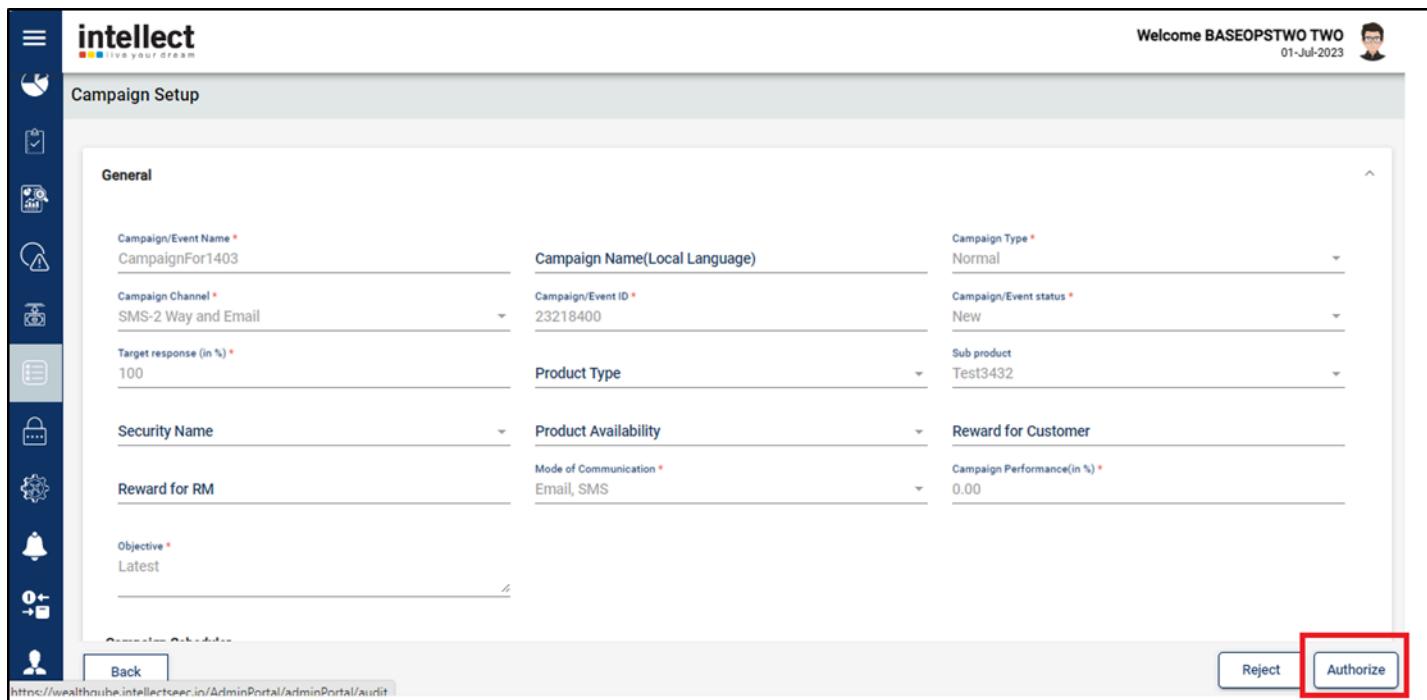
- Brochure - View brochures related to the campaign



The screenshot shows the Intellect software interface with a sidebar containing various icons. The main area displays a 'Brochures' form under the 'Campaign Setup' section. The 'Brochure(s)' section is highlighted with a red box. Within this section, the 'Attachment' and 'Content' fields are also highlighted with a red box. The form includes fields for 'Content Type', 'Order No.', 'Name', 'Upload', and 'View'. Buttons for 'Delete', '+ Add', 'Reset', 'Preview', 'Save as draft', and 'Save' are located at the bottom right.

Screen: Brochures

- After Viewing the Campaign details, the Supervisor can do the following:
 - Authorize** - Click on the "Authorize" button to approve the campaign



Welcome BASEOPSTWO TWO
01-Jul-2023

Campaign Setup

General

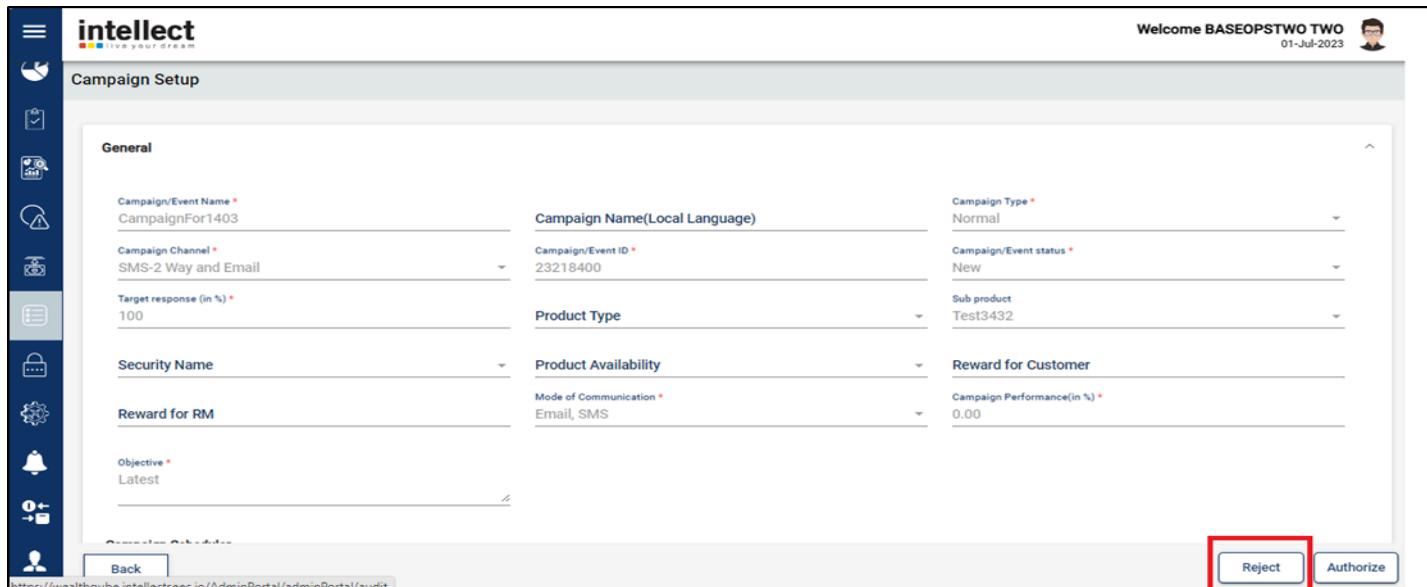
Campaign/Event Name *	CampaignFor1403	Campaign Name(Local Language)	Campaign Type *
Campaign Channel *	SMS-2 Way and Email	Campaign/Event ID *	Normal
Target response (in %) *	100	Product Type	Campaign/Event status *
Security Name		Product Availability	New
Reward for RM		Mode of Communication *	Sub product
Objective *	Latest	Email, SMS	Test3432
Campaign Performance(in %) * 0.00			

Action Buttons: Back, Reject, Authorize

<https://wealthtube.intellectcear.in/AdminPortal/adminPortal/audit>

Screen: Authorize the Campaign

- ii. **Reject** - Click on the “Reject” button to capture the Rejection Reason, and subsequently on the “Reject” button on the overlay to reject the Campaign



Welcome BASEOPSTWO TWO
01-Jul-2023

Campaign Setup

General

Campaign/Event Name *	CampaignFor1403	Campaign Name(Local Language)	Campaign Type *
Campaign Channel *	SMS-2 Way and Email	Campaign/Event ID *	Normal
Target response (in %) *	100	Product Type	Campaign/Event status *
Security Name		Product Availability	New
Reward for RM		Mode of Communication *	Sub product
Objective *	Latest	Email, SMS	Test3432
Campaign Performance(in %) * 0.00			

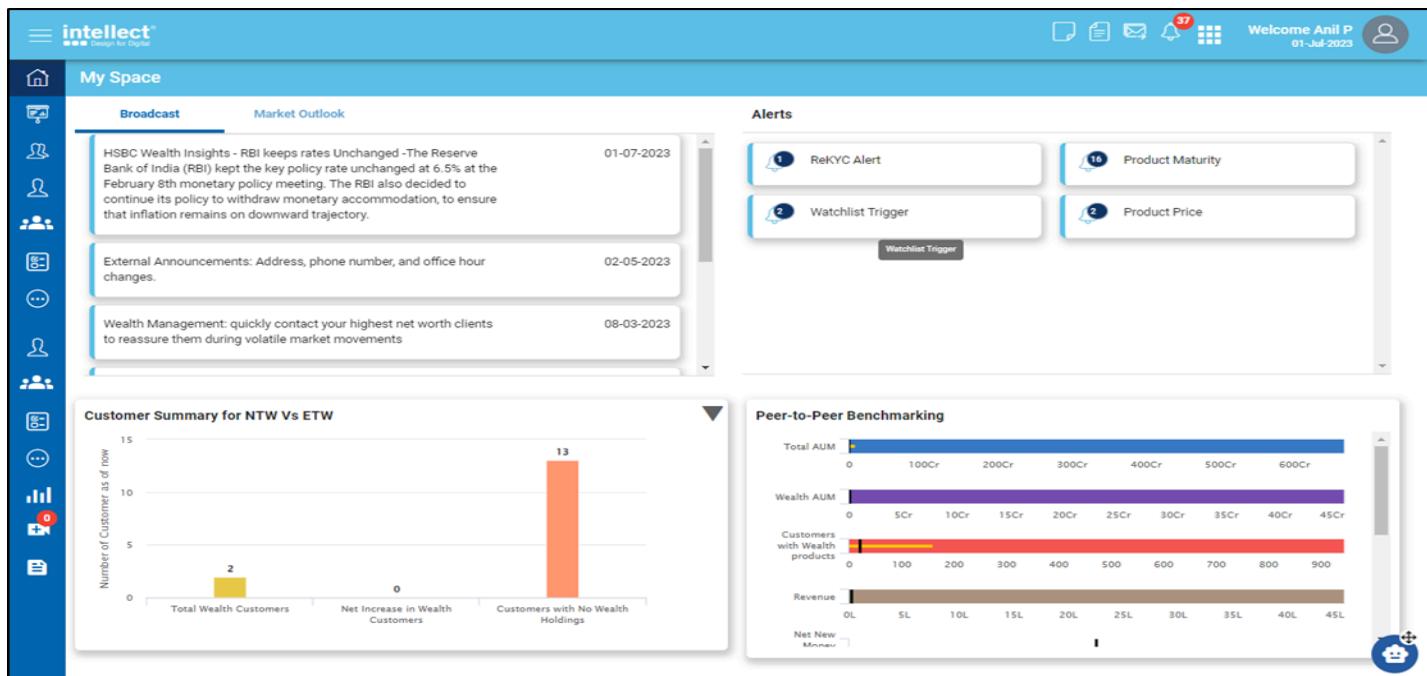
Action Buttons: Back, Reject, Authorize

<https://wealthtube.intellectcear.in/AdminPortal/adminPortal/audit>

Screen: Reject the Campaign and capture Reject Reason

4.3.8 View Campaign Dashboard

1. The Campaign Dashboard can be accessed from the RM Office Module. Once the User has logged into RM office, they can navigate to the Campaign Dashboard by clicking on the Campaign Management widget on the left panel. In the Campaign Dashboard screen, the User can
 - a. View and Track all metrics related to the active campaigns tagged to them
 - b. Navigate to the Capture Response screen



The screenshot displays the Intellect Design for Digital Campaign Dashboard. The top navigation bar includes icons for file, edit, mail, and notifications (37), and a welcome message for 'Anil P' dated '01-Jul-2023'. On the left, a vertical sidebar lists various modules: Home, Broadcast, Market Outlook, Customer Summary, Peer-to-Peer Benchmarking, and others. The main area is divided into several sections:

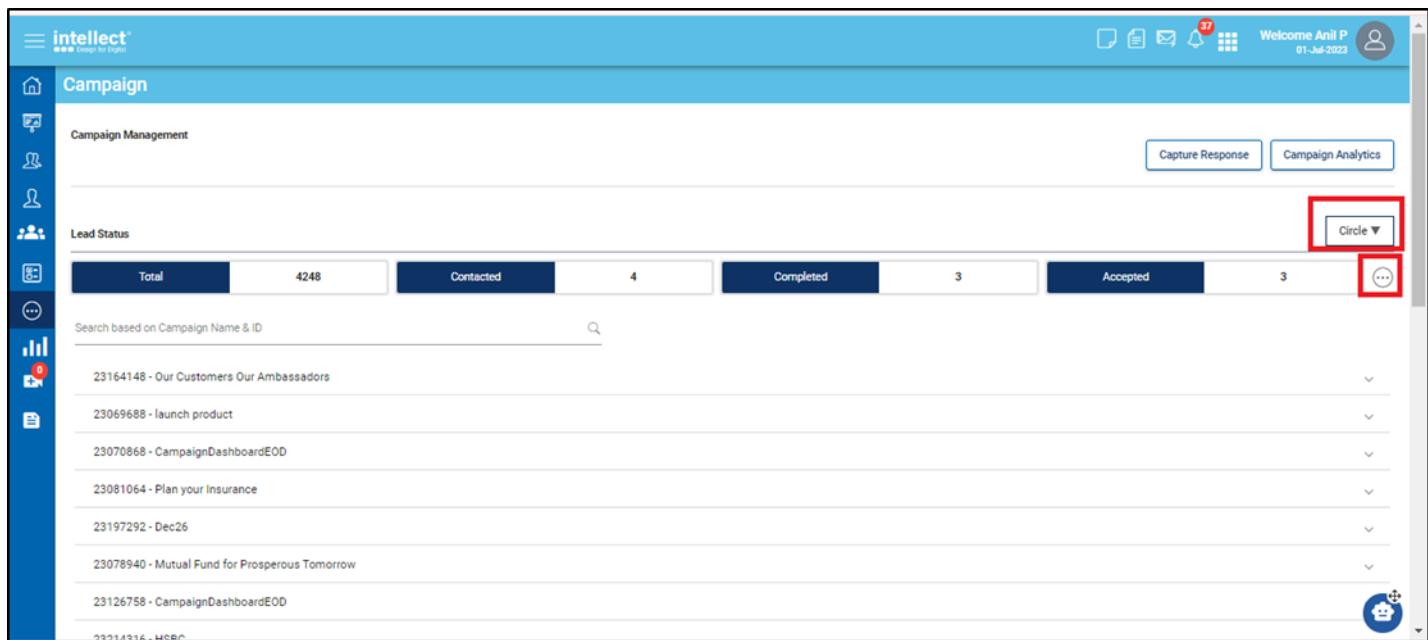
- Broadcast:** Shows three news items with dates: 'HSBC Wealth Insights - RBI keeps rates Unchanged -The Reserve Bank of India (RBI) kept the key policy rate unchanged at 6.5% at the February 8th monetary policy meeting. The RBI also decided to continue its policy to withdraw monetary accommodation, to ensure that inflation remains on downward trajectory.' (01-07-2023), 'External Announcements: Address, phone number, and office hour changes.' (02-05-2023), and 'Wealth Management: quickly contact your highest net worth clients to reassure them during volatile market movements' (08-03-2023).
- Alerts:** A section listing four alerts: 'ReKYC Alert' (1 notification), 'Product Maturity' (16 notifications), 'Watchlist Trigger' (2 notifications), and 'Product Price'.
- Customer Summary for NTW Vs ETW:** A bar chart showing the number of customers as of now. Data points: Total Wealth Customers (2), Net Increase in Wealth Customers (0), and Customers with No Wealth Holdings (13).
- Peer-to-Peer Benchmarking:** A horizontal bar chart comparing various financial metrics across different entities. Metrics include Total AUM, Wealth AUM, Customers with Wealth products, Revenue, and Net New Miners.

Screen: Navigate to the Campaign Dashboard



Screen: Campaign Dashboard

2. The User can apply filters by clicking on the “Circle” button to show the Lead Status for the selected regions for active campaigns



Screen: Filter and Three Dots

The screenshot shows the 'Campaign' management screen. At the top right, there is a 'Capture Response' button and a 'Campaign Analytics' button. Below them is a 'Circle' button, which is highlighted with a red box. A modal window titled 'Circle' is open, containing a list of locations with checkboxes. The 'Select All' checkbox is checked, and several other locations like 'CORPORATE CENTRE', 'KOLKATA LHO', etc., have checkboxes next to them. A close 'X' button is at the top right of the modal.

Screen: Select Circle Filter

3. The User can collapse the Graphs by clicking on the “Three Dots” button should they wish to. The graphs can be expanded by clicking on the “Three Dots” button again

The screenshot shows the same 'Campaign' management screen. The 'Circle' button is now collapsed, indicated by a small three-dot icon. Below it, a bar chart is displayed. The chart has 'Count' on the y-axis (0 to 4,000) and categories on the x-axis: 'New', 'Ready for Follow-up', 'In Progress', 'Client Accepted', and 'Client Rejected'. The 'New' category shows a stacked bar with approximately 2,200 blue and 1,800 orange segments. Below the chart is a legend with various campaign names and their corresponding colors. A 'More' button (three dots) is located to the right of the chart, and a 'Graph' icon is at the bottom right of the chart area.

Screen: Three Dots – Expanded View

Campaign Management

Lead Status

Total	4248	Contacted	4	Completed	3	Accepted	3	...
Search based on Campaign Name & ID								🔍
23164148 - Our Customers Our Ambassadors								▼
23069688 - launch product								▼
23070868 - CampaignDashboardEOD								▼
23081064 - Plan your Insurance								▼
23197292 - Dec26								▼
23078940 - Mutual Fund for Prosperous Tomorrow								▼
23126758 - CampaignDashboardEOD								▼
23214216 - HSBC								▼

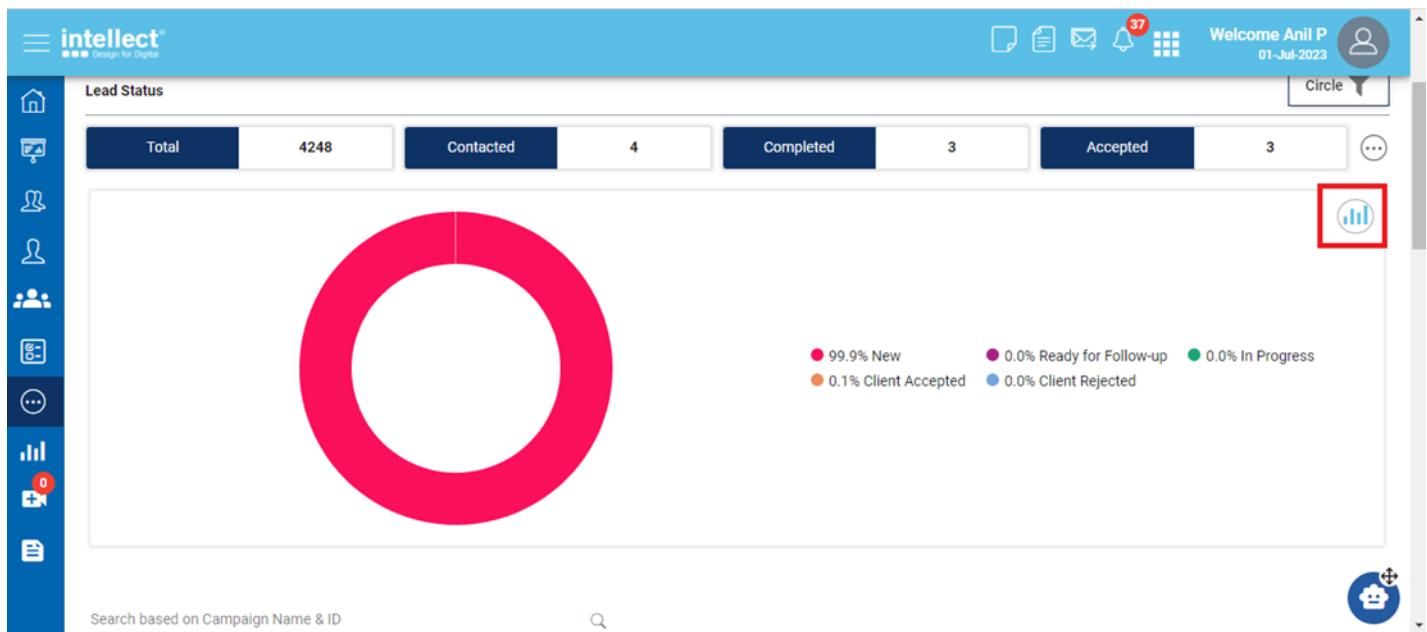
Screen: Collapsed Graphs

- The User can switch between a Column chart or Pie Chart view by clicking on the button (highlighted) in the top right corner of the graph

Lead Status

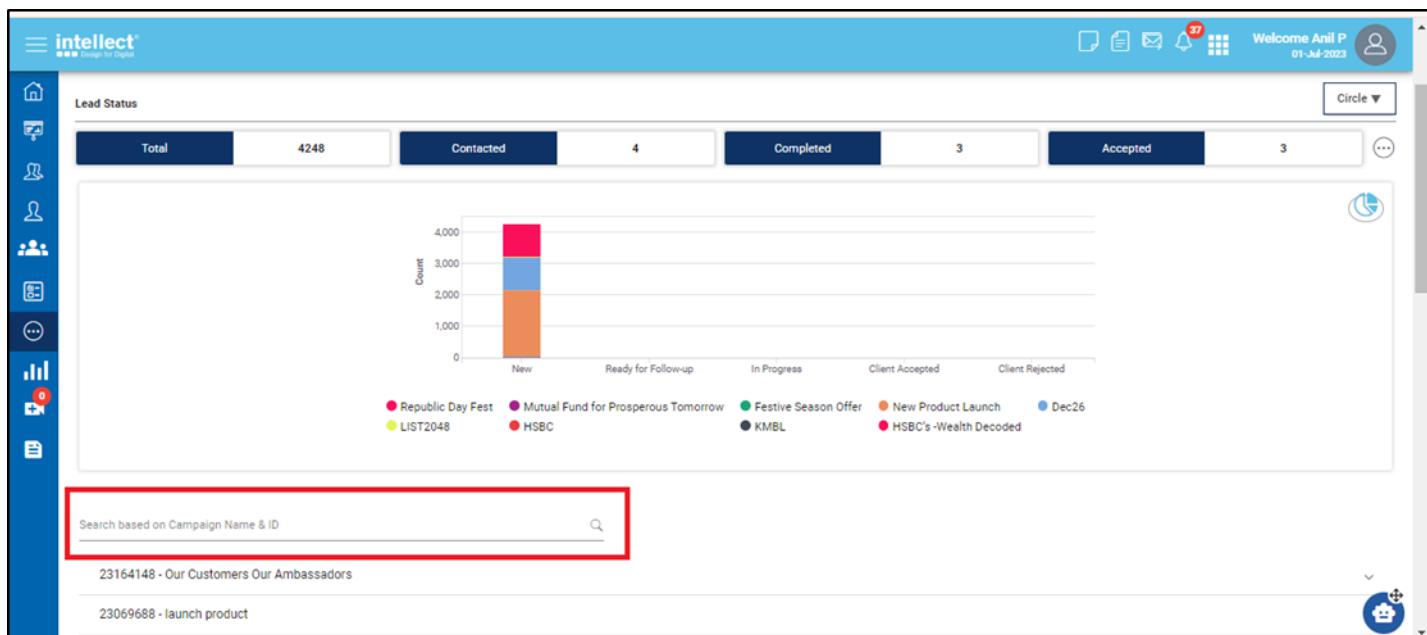
Total	4248	Contacted	4	Completed	3	Accepted	3	...										
								...										
<p>Count</p> <table border="1"> <tr> <td>4,000</td> <td>3,000</td> <td>2,000</td> <td>1,000</td> <td>0</td> </tr> <tr> <td>New</td> <td>Ready for Follow-up</td> <td>In Progress</td> <td>Client Accepted</td> <td>Client Rejected</td> </tr> </table>								4,000	3,000	2,000	1,000	0	New	Ready for Follow-up	In Progress	Client Accepted	Client Rejected	...
4,000	3,000	2,000	1,000	0														
New	Ready for Follow-up	In Progress	Client Accepted	Client Rejected														
<p>Legend:</p> <ul style="list-style-type: none"> Republic Day Fest Mutual Fund for Prosperous Tomorrow Festive Season Offer New Product Launch Dec26 LIST2048 HSBC KMBL HSBC's -Wealth Decoded 								...										
Search based on Campaign Name & ID								🔍										

Screen: Column Chart View



Screen: Pie Chart View

- The User can view the campaign-specific lead status either by searching for the Campaign by entering the Campaign Name and ID, or by clicking on the “Down Arrow” beside the campaign name to expand the view. This view can be collapsed by clicking on the “Up Arrow” beside the Campaign name



Screen: Search for a Campaign

- The “Lead status by campaign” and “Lead status by channel” are displayed to the user. Leads who are followed up by the RM (RM updates the lead response status – refer to section Capture Responses) would be tracked under the “RM Follow up”

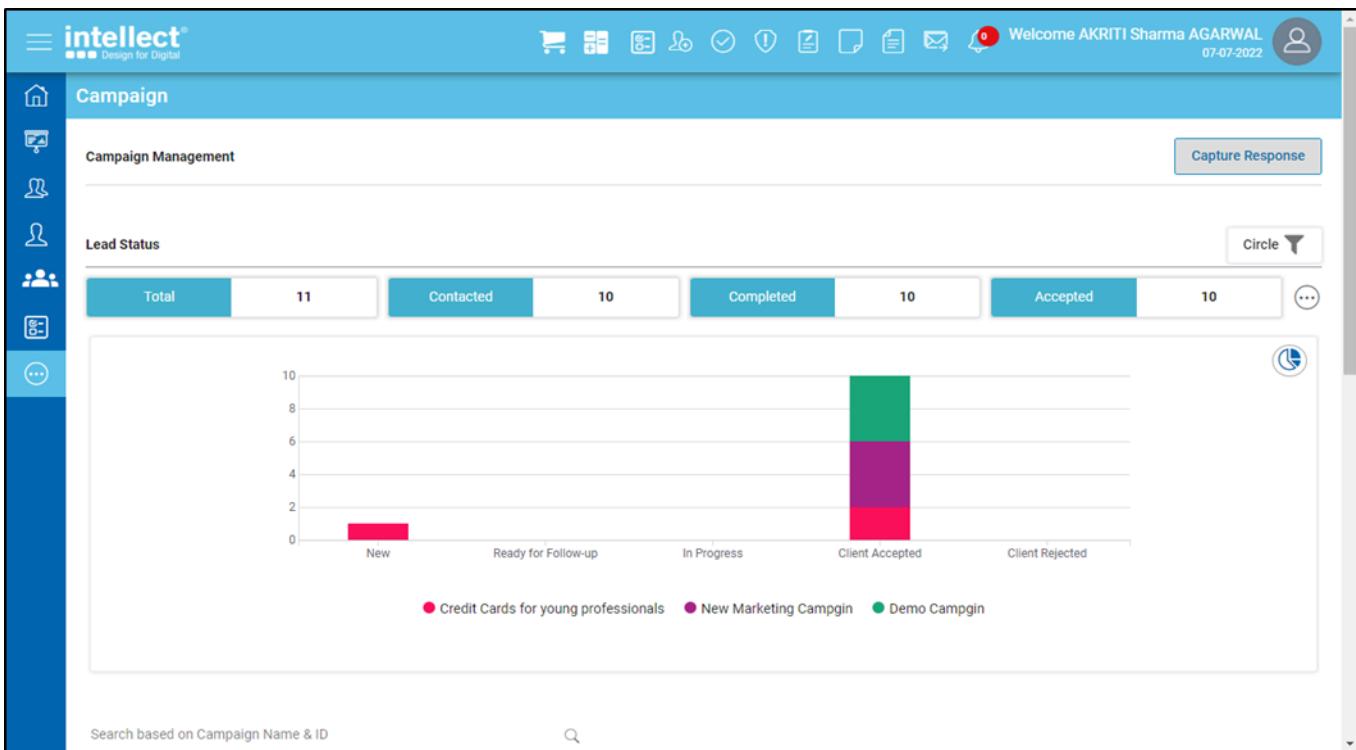
channel. Leads for whom the response status is received through campaign communication channels (No Contact, SMS-2 way and Email, SMS-2 way, SMS-1 way, Email, SMS-1 way and Email) can be uploaded in the system and would be tracked under the respective campaign communication channel (refer to section Lead Upload for the process steps of uploading Campaign Response Status File). The process steps are same for Lead Upload and Campaign Response Upload (refer to Annexure for Campaign Response Upload Template)



Screen: Individual Campaign Lead Status

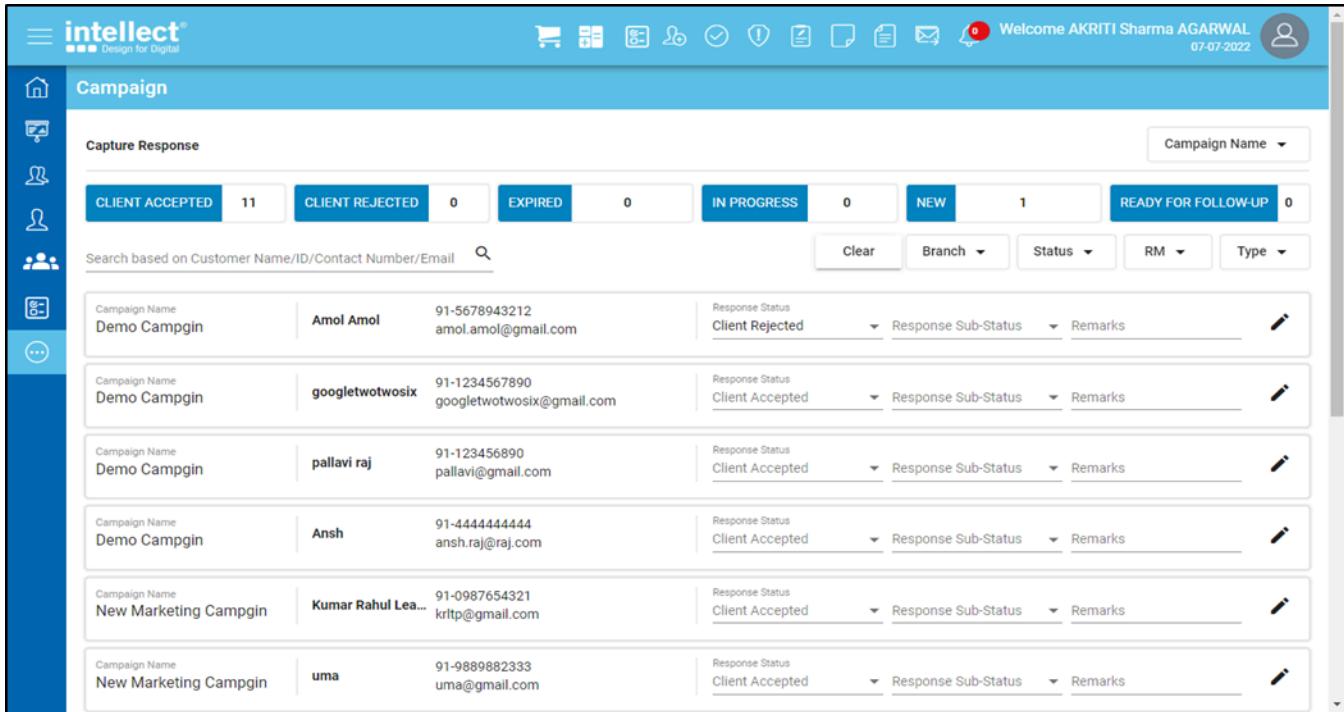
4.3.8.1 Capture Responses

1. The User can navigate to the Capture Response screen by clicking on the “Capture Response” button in the Campaign Dashboard screen. In this screen, the User can capture Lead Responses for active campaigns tagged to them



Screen: Navigating to the Capture Response screen

2. After navigating to the Capture Response screen, the User can use the following filters available to help them capture Lead responses:
 - a. Campaign Name - Filter by Campaign Name
 - b. Branch - Filter by Branch
 - c. Sub-Status - Filter by Lead Sub Status based on the Lead Status such as Call Back, Uncontactable – Max Attempt, etc.
 - d. Status - Filter by Lead Status such as New, Ready for Follow Up, In Progress, Client Accepted, and Client Rejected
 - e. RM - Filter by RM
 - f. Type - Filter by Type for Lead and CIF (If the Lead is an existing wealth customer)
3. The User can search for a Lead by entering anyone of the following:
 - a. Customer Name
 - b. Customer ID
 - c. Contact Number
 - d. Email
4. After searching/navigating to the Lead, the User can capture the following details for the Lead:
 - a. Response Status – Response statuses available are New, Ready for Follow-Up, In Progress, Client Accepted, and Client Rejected
 - b. Response Sub Status – Response Sub statuses available are Call Back, Uncontactable – Deceased, and Uncontactable – Max Attempt, etc., depending on the Response Status
 - c. Remarks – Any additional remarks can be captured
5. The summary of responses captured can be viewed on the Campaign Dashboard (refer to section View Campaign Dashboard)



Campaign Name	Contact Person	Contact Number	Email	Response Status	Remarks
Demo Campgin	Amol Amol	91-5678943212	amol.amol@gmail.com	Client Rejected	
Demo Campgin	googletwotwoxit	91-1234567890	googletwotwoxit@gmail.com	Client Accepted	
Demo Campgin	pallavi raj	91-123456890	pallavi@gmail.com	Client Accepted	
Demo Campgin	Ansh	91-4444444444	ansh.raj@raj.com	Client Accepted	
New Marketing Campgin	Kumar Rahul Lea...	91-0987654321	krltp@gmail.com	Client Accepted	
New Marketing Campgin	uma	91-9889882333	uma@gmail.com	Client Accepted	

Screen: Capture Response screen

4.3.9 File Call Report

1. The User can File a call report for any Lead by clicking on  icon to navigate to Call Report Screen
2. In the Call Report screen, the User can capture the following information:
 - a. Meeting Particulars
 - b. Meeting Information
 - c. Invitees
3. After entering the relevant details, the User can click on the “Save” and subsequently the “Confirm” button to save the Call Report and navigate back to the Capture Response screen. In case the User wants to clear the details filled, they can click on the “Reset” button

The screenshot shows the 'Add New Call Report' screen in the intellect software. The top navigation bar includes icons for Home, Campaigns, Leads, Opportunities, Tasks, Events, Notes, and Attachments, along with a welcome message for 'AKRITI Sharma AGARWAL' from '07-07-2022' and a user profile icon.

Meeting Particulars

Meeting Reason*: Campaign Details

Subject*

Start Date*: 07-07-2022

End Date*: 07-07-2022

Location*

Client Status

Next Meeting Start Date

Next Meeting Start Time

Next Meeting End Date

Next Meeting End Time

State Of Mind

Screen: File Call Report

5. Field Level Details/Upserts

S No	Field Name	Field Description	Field Type	Editable	Data Type	Mandatory	List of Values	Remarks
Campaign Definition – Grid								
1	Campaign/Event Name	Displays the Campaign/Event Name	Display	No	String	Yes	Not Applicable	
2	Campaign Type	Displays the Campaign Type	Display	No	String	Yes	1. Event 2. Normal	
3	Campaign/Event Status	Displays the status of the campaign	Display	No	Character	Yes	1. New 2. Rejected 3. Active 4. Completed	
4	Target response in (%)	Displays the target response in (%)	Display	No	Numeric	Yes	Not Applicable	
5	Status	Displays the authorization status of the campaign	Display	No	String	Yes	1. Authorized 2. Unauthorized 3. Modified 4. Rejected	
6	Maker Id-Maker Name	Displays the Maker Id and Name	Display	No	String	No	Not Applicable	
7	Authorizer Id-Authorizer Name	Displays the Authorizer Id and Name	Display	No	String	No	Not Applicable	
8	Creation date	Displays the creation date of the campaign	Display	No	String	Yes	Not Applicable	
Campaign Definition – General								
1	Campaign/Event name	Inputs the Campaign/Event name	Input	Yes	String	Yes	Not Applicable	
2	Campaign name (local language)	Input the Campaign name	Input	Yes	String	No	Not Applicable	
3	Campaign Type	Select the	Select	Yes	String	Yes	1. Event	

		Campaign Type					2. Normal	
4	Campaign/event ID	Displays the Campaign/Event ID. For a new campaign, this field is not editable	Display	No	Numeric	Not Applicable	Not Applicable	
5	Target response rate (%)	Inputs the Target response rate (%)	Input	Yes	Numeric	Yes	0-100	
6	Objective	Inputs the Objective of the campaign	Input	Yes	String	Yes	Not Applicable	
7	Campaign Channel	Selects the Campaign Channel for broadcasting the campaign information	Select	Yes	String	Yes	1. No contact 2. SMS-2 way and Email 3. SMS-2 way 4. SMS-1 way 5. Email 6. SMS-1 way and Email	
8	Campaign/Event Status	Displays the status of the campaign	Display	No	Character	Not Applicable	1. New 2. Rejected 3. Active 4. Completed	
9	Sub Product	Selects the type of sub products associated with campaign	Select	Yes	String	No	List of sub products	
10	Product Type	Selects the type of products associated with campaign	Select	Yes	String	No	List of products	
11	Product Availability	Selects the availability of campaign product	Select	Yes	String	No	1.Yes 2.No	
12	Product Name	Selects the name of product	Select	Yes	String	No	Not Applicable	
13	Reward For RM	Inputs the reward to RM on successfully achieving the	Input	Yes	String	No	Not Applicable	

		campaign targets						
14	Reward for customer	Inputs the reward to customer if he/she subscribe to the campaign	Input	Yes	String	No	Not Applicable	
15	Campaign Performance (%)	Displays the campaign performance	Display	No	Numeric	Yes	0-100	
16	Mode of communication	Selects the mode of communication for campaign with the customer	Select	Yes	String	Yes	1. SMS 2. Telephone 3. Email 4. Face to Face 5. Others	
17	Start Date	Inputs the campaign start date	Input	No	String	Yes	Not Applicable	
18	End date	Inputs the campaign end date	Input	Yes	String	Yes	Not Applicable	
19	Broadcast Date and Time	Inputs the date and time at which campaign information will be broadcasted	Input	Yes	Numeric	No	Not Applicable	
20	Campaign Period(Days)	Displays the period during which campaign will be active	Display	No	Numeric	Yes	Not Applicable	
21	Remarks	Inputs the remarks for the campaign	Input	Yes	String	No	Not Applicable	
Campaign Definition – Financials								
1	Cost type	Selects the Cost type for the campaign	Select	Yes	Select	No	1. Advertisement cost 2. Campaign cost	
2	Budget	Inputs the Budget for the selected Cost Type	Input	Yes	Numeric	No	Not Applicable	

3	Actual cost	Inputs the Actual Cost for the selected Cost Type	Input	Yes	Numeric	No	Not Applicable	
4	Currency	Selects the Currency for the selected cost type. This is defaulted to INR	Select	Yes	String	No	List of Currencies	
Campaign Definition – Admin								
1	Campaign Manager Name	Selects the Campaign manager name	Select	Yes	String	Yes	List of all users	
2	Campaign Manager Contact No	Displays the Campaign manager Contact No	Display	No	String	No	Not Applicable	
3	Campaign Manager Email	Displays the Campaign manager Email	Display	No	String	No	Not Applicable	
4	List name	Selects the Lead List	Select	Yes	String	No	List Management Lead Lists	
5	Rule criteria	Displays the Rule criteria of the Lead List	Display	No	String	No	Not Applicable	
Campaign Definition - Admin - Lead List View								
1	List ID	Displays the List ID	Display	No	Numeric	Not Applicable	Not Applicable	
2	List name	Displays the List name	Display	No	String	Not Applicable	Not Applicable	
3	Cust No	Displays the Lead Number	Display	No	Alphanumeric	Not Applicable	Not Applicable	
4	Name	Displays the Lead Name	Display	No	String	Not Applicable	Not Applicable	
5	Entity type	Displays the Entity type if it is Lead (New to bank Customer) or CIF	Display	No	String	Not Applicable	1. Lead 2. CIF	

		(Existing wealth Customer)						
Campaign Definition - Campaign Notes								
1	Subject	Inputs the Subject of the email for the campaign communication	Input	Yes	String	Yes	Not Applicable	
2	Email Body	Inputs the Email Content for the campaign communication	Input	Yes	String	No	Not Applicable	
3	Signature	Inputs the Signature of the institution	Input	Yes	String	Yes	Not Applicable	
4	SMS	Inputs the SMS content for the campaign communication	Input	Yes	String	Yes	Not Applicable	
Campaign Definition – Brochures								
1	Content Type	Selects the Content Type to be sent as part of campaign email communication	Select	Yes	Select	No	1. Attachment 2. Content	
2	Order No	Inputs the Order Number for the content type selected	Input	Yes	Numeric	No	Not Applicable	
3	Name	Inputs the Name for the content type selected	Input	No	String	No	Not Applicable	
4	Upload	Uploads the attachment for the content type	Input	Yes	Upload	No	Not Applicable	
5	View	Views the attachment uploaded for the content type	Display	Not Applicable	String	No	Not Applicable	
List Management – Grid								

1	List ID	Displays the Lead List ID	Display	No	String	Yes	Not Applicable	
2	List Name	Displays the Lead List Name	Display	No	String	Yes	Not Applicable	
3	Rule criteria	Displays the Lead Rule criteria of the list	Display	No	String	Yes	1. Lead Rule Criteria 2. Upload 3. Merge	
List Management								
1	CIF	Displays the ID number of the lead	Display	No	Numeric	Yes	Not Applicable	
2	Customer Name	Displays the Name of the lead	Display	No	Character	Yes	Not Applicable	
3	Local language name	Displays the Name of the lead in local language	Display	No	Character	Yes	Not Applicable	
4	Relationship Manager Name & ID	Displays the RM ID_RM Name of the lead	Display	No	Character	Yes	Not Applicable	
5	Branch	Displays the Branch ID_Branch Name of the lead	Display	No	Character	Yes	Not Applicable	
6	Circle	Displays the Circle of the lead	Display	No	Character	Yes	Not Applicable	
Lead Rule Grid								
1	Criteria ID	Displays the lead rule Criteria ID	Display	No	Numeric	Not Applicable	Not Applicable	
2	Criteria Name	Displays the lead rule Criteria Name	Display	No	String	Not Applicable	Not Applicable	
3	Criteria	Displays the Criteria definition of the lead rule	Display	No	String	Not Applicable	Not Applicable	
4	Status	Displays the Status of the lead rule	Display	No	String	Not Applicable	Not Applicable	
5	Owner ID	Displays the	Display	No	String	Not	Not Applicable	

		Owner ID of user who has created lead rule				Applicable		
6	Creation Date	Displays the Creation Date of the lead rule	Display	No	String	Not Applicable	Not Applicable	
Lead Rule								
1	Criteria Name	Inputs the criteria name for the lead rule	Input	Yes	String	Yes	NA	
2	Select Criteria	Selects the criteria for the lead rule	Select	Yes	String	Yes	1. Segment 2. Differently Abled Person 3. ISA Form 4. Client category 5. Tax Status 6. Wealth Hub 7. Total AUM/Credit 8. Fixed Income Holdings 9. Currency 10. Fixed Income Last purchase 11. No. of Product Type Holdings 12. Product Name 13. Current Age 14. Birthday 15. Gender 16. Citizenship 17. Last Contacted 18. Risk Appetite 19. Marital Status 20. No. of dependents 21. CIS creation date 22. Branch 23. City/Town 24. State	

							25. Postcode 26. Employer 27. Customer Category 28. Type of Business Unit 29. Deposits Holding 30. Investment Holding 31. Insurance Holding 32. Loan Holding 33. Current account Holding 34. Savings account Holding 35. Fixed deposit Account Holding 36. Mutual Fund Holding 37. Bonds Holding 38. Equity Holding 39. Structured investment Holding	
3	Condition	Selects the Condition for the lead rule	Input	Yes	String	Yes	Logical Operators	
4	Please select a record	Selects/Inputs the entity for the lead rule criteria	Input/Select	Yes	String	Yes	List is based on Criteria	
Campaign Dashboard								
1	Total	Displays the total leads of all the active campaigns	Display	No	Numeric	Not Applicable	Not Applicable	
2	Contacted	Displays the number of leads contacted If campaign	Display	No	Numeric	Not Applicable	Not Applicable	

		channel is No contact - "Client Accepted + Client Rejected + In Progress" If campaign channel is SMS/EMAIL – "Ready for follow up + Client Accepted + Client Rejected +In progress"						
3	Completed	Displays the number of completed leads "Client Accepted + Client Rejected"	Display	No	Numeric	Not Applicable	Not Applicable	
4	Accepted	Displays the number of leads accepted "Client Accepted"	Display	No	Numeric	Not Applicable	Not Applicable	
5	Circle	Filters the Campaign Dashboard details for the circle selected	Filter	No	Character	Not Applicable	List of Circles	
Lead Response – Summary								
1	New	Displays the number of leads with Response Status :New	Display	No	Numeric	Not Applicable	Not Applicable	
2	Ready for Follow	Displays the number of leads with Response Status : Ready for Follow Up	Display	No	Numeric	Not Applicable	Not Applicable	
3	In Progress	Displays the number of leads with Response Status : In Progress	Display	No	Numeric	Not Applicable	Not Applicable	

4	Client Accepted	Displays the number of leads with Response Status : Client Accepted	Display	No	Numeric	Not Applicable	Not Applicable	
5	Client Rejected	Displays the number of leads with Response Status : Client Rejected	Display	No	Numeric	Not Applicable	Not Applicable	
Lead Response - Search and Filter								
1	Search Based on customer name/ ID/Contact Number/ Email	Search Based on Lead name/ ID/ Contact Number/ Email	Input	Yes	Character	No	Not Applicable	
2	Clear	Clears the filters applied	Clear	Not Applicable	Character	Not Applicable	Not Applicable	
3	Branch	Filters the leads for the selected branch	Select	Yes	Character	No	List of Branches	
4	Status	Filters the leads for the selected Status	Select	Yes	Character	No	1. New 2. Ready for Follow Up 3. In Progress 4. Client Accepted 5. Client Rejected	
5	RM	Filters the leads for the selected RM	Select	Yes	Character	No	List of RMs	
6	Type	Filters the leads for the selected type Lead (New to bank Customer) or CIF (Existing wealth Customer)	Select	Yes	Character	No	1. Lead 2. CIF	
Capture Lead Response								

1	Campaign Name	Displays the Campaign Name of the Lead	Display	No	Character	Not Applicable		
2	Lead Name	Displays the Lead Name	Display	No	Character	Not Applicable		
3	Lead Contact Number	Displays the Lead Contact Number	Display	No	Numeric	Not Applicable		
4	Lead Email Address	Displays the Lead Email Address	Display	No	String	Not Applicable		
5	Response status	Selects the Response status of the Lead	Select	Yes	Character	No	1. New 2. Ready for Follow Up 3. In Progress 4. Client Accepted 5. Client Rejected	
6	Response sub status	Selects the Response sub status of the Lead	Select	Yes	Character	No	For In Progress: Appointment Call back Deactivate Follow up Need Analysis Pending Document Requested for more information Under consideration For Client Rejected: Better competitor offer Customer hung up Do not call for telemarketing Not eligible Out of Geographical Area Poor customer experience Product Out of Scope Unattractive	

							promo or product Uncontactable - Deceased Uncontactable - Incomplete Info Uncontactable - Invalid Telephone No. Uncontactable - Max attempt Uncontactable - Others Wrong timing	
7	Remarks	Inputs the Remarks for the Lead	Input	Yes	String	No		
Add new call report								
1	Meeting Reason	Displays the Meeting Reason as Campaign Details	Display	No	String	Yes	1. Campaign Details	
2	Subject	Inputs the Subject for the call report	Input	Yes	String	Yes	Not Applicable	
3	Start Date	Inputs the Start Date	Input	Yes	String	Yes	Not Applicable	
4	Start Time	Inputs the Start Time	Input	Yes	String	Yes	Not Applicable	
5	End Date	Displays the End Date (same as Start Date)	Display	No	String	Yes	Not Applicable	
6	End Time	Inputs the End Time	Input	Yes	String	Yes	Not Applicable	
7	Location	Inputs the Lead Location	Input	Yes	String	Yes	Not Applicable	
8	Client Status	Selects the Client Status	Select	Yes	String	No	1. Client Abroad, Email Taken 2. Conference Call 3. Not Contactable	

							4. Not Interested In Bank Services 5. None	
9	Next Meeting Start Date	Inputs the Next Meeting Start Date	Input	Yes	String	Yes	Not Applicable	
10	Next Meeting Start Time	Inputs the Next Meeting Start Time	Input	Yes	String	Yes	Not Applicable	
11	Next Meeting End Date	Inputs the Next Meeting End Date	Input	Yes	String	Yes	Not Applicable	
12	Next Meeting End Time	Inputs the Next Meeting End Time	Input	Yes	String	Yes	Not Applicable	
13	State Of Mind	Selects the State Of Mind	Select	Yes	String	No	1. Happy 2. Irate 3. Satisfied 4. Sensitive 5. None	
Call Report - Meeting Information								
1	Meeting Type	Displays the Meeting Type (defaulted to Lead)	Display	No	String	Yes	1. Lead	
2	Mode of Meeting	Selects the Mode of Meeting	Select	Yes	String	Yes	1. Face-to-Face 2. In-Person 3. In-Person Offshore 4. Others 5. Telephone 6. Telephone Offshore 7. Video Conference 8. Video Conference Offshore	
3	Relationship	Displays the Lead Name and Lead ID	Display	No	String	Not Applicable	Not Applicable	
4	Person Met	Inputs the name of the Person who	Input	Yes	Character	No	Not Applicable	

		met the lead						
5	Summary Of Discussion	Inputs the summary of discussion	Input	Yes	String	Yes	Not Applicable	
6	Remarks	Inputs the Remarks	Input	Yes	String	No	Not Applicable	
7	Opportunity	Inputs the opportunity	Input	Yes	String	No	Not Applicable	
8	Opportunity Date	Inputs the opportunity Date	Input	Yes	String	No	Not Applicable	
9	Contact Details	Inputs the Contact details of the Lead	Input	Yes	String	Yes	Not Applicable	
10	Attendees	Selects the list of attendees for the meeting	Select	Yes	String	Yes	List of users	

6. Validations

1. Mandatory Field Verification - The system will validate whether all the mandatory fields with * mark are filled in by the user or not
2. If the campaign channel is selected as Email/SMS-1 Way and Email/SMS-2 Way and Email, then user has to mandatorily define the email template at the time of campaign creation
3. If the campaign channel is selected as SMS – 1 way/SMS – 2 way/ SMS-1 Way and Email/ SMS-2 Way and Email , then user has to mandatorily define the SMS template at the time of campaign creation

7. Actors/Entitlements

1. Operations Team
2. Product Team
3. Campaign Manager
4. RM
5. Supervisor

8. Annexure

1. The template for the Lead Upload is attached below.



2. The template for the Campaign Response is attached below (only xls attachments are allowed)



3. The sample Campaign Reports are attached below



9. Glossary

N/A

1. The terms RM Office and PMS refer to the same application and may have been used interchangeably throughout this document