

Journey of Suspect to Lead

State Bank Of India

Document Version History

Date	Prepared By	Reviewer & Date of Review	Approver & Date of Approval	Version	Change Details
6 Sep 2021	Neha Rathore	Patanjal nag Biswas 07 Sep 2021		1.0	Initial Document
03 Jan 2022	Neha Rathore	Patanjal Nag Biswas, 6 Jan 2022	Manju 09 Jan 2022	1.1	Addition of DC02 in Addendum Section
25 Jan 2022	Nagaraj Prasad	Rahul Anand 25 Jan 2022		1.2	Changes of screen as per SBI Entitlement
03 Feb 2022	Rahul Anand	Neha Rathore 03 feb 2022		1.3	Addition of fields in campaign definition-General and brochure field level details

Distribution List

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1. Introduction

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

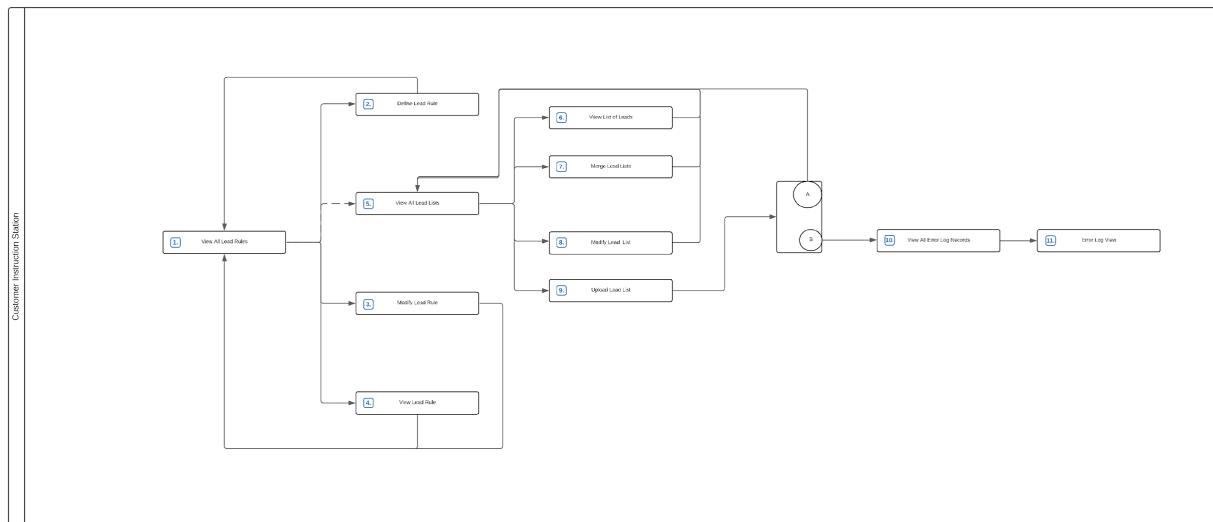
The purpose of this document is to guide the users through the process of creating and managing campaigns, creating and managing a list of intended recipients of the campaign and recording responses pertaining to the underlying campaigns.

2. Prerequisites

S No	Process	Reference Document
1	Customer Onboarding	Journey of Lead to Prospect and Prospect to Customer
2	User Maintenance	ARX Manual, Journey of Defining Maintenance

3. Flow Diagram

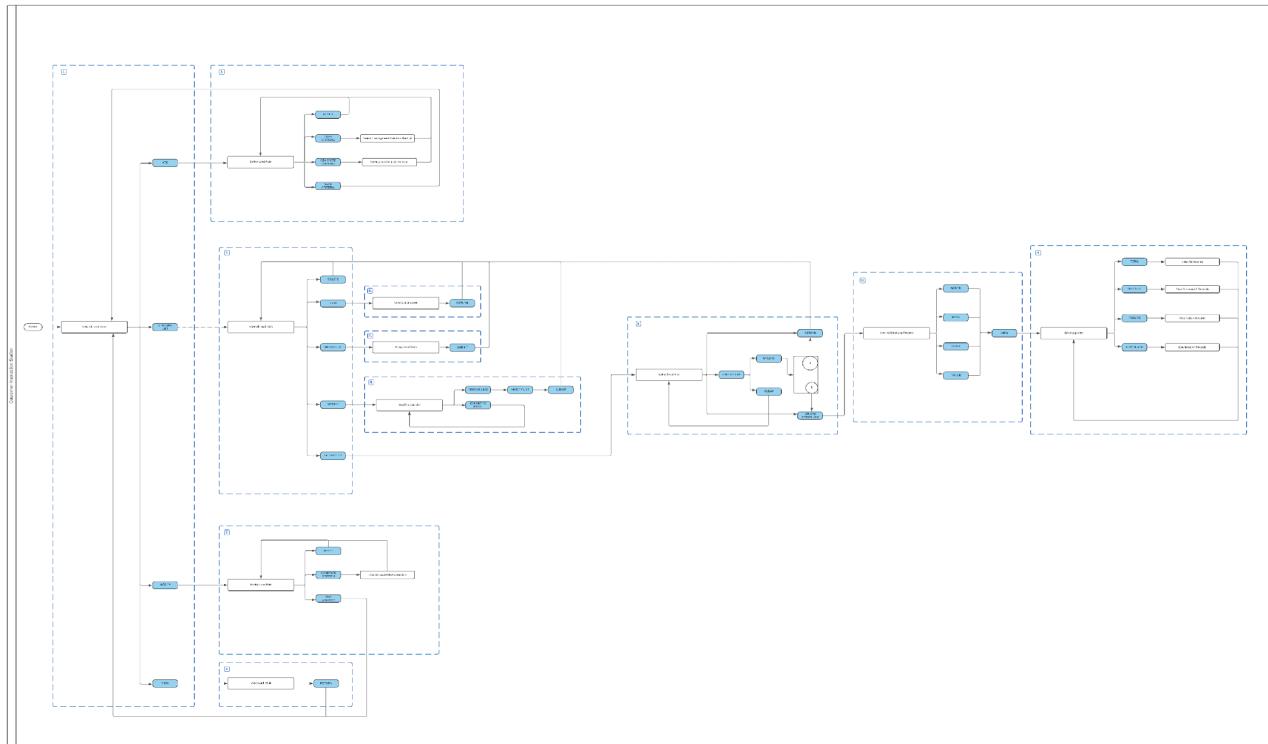
1. The below three flow diagrams reflects the process flow for Lead List Management at L2, L3 and L4 level. L1 is not applicable for “Journey of Suspect to Lead” since there are no external interfaces (refer to Glossary for definitions)



Lead List Management Flow Diagram (L2 View)



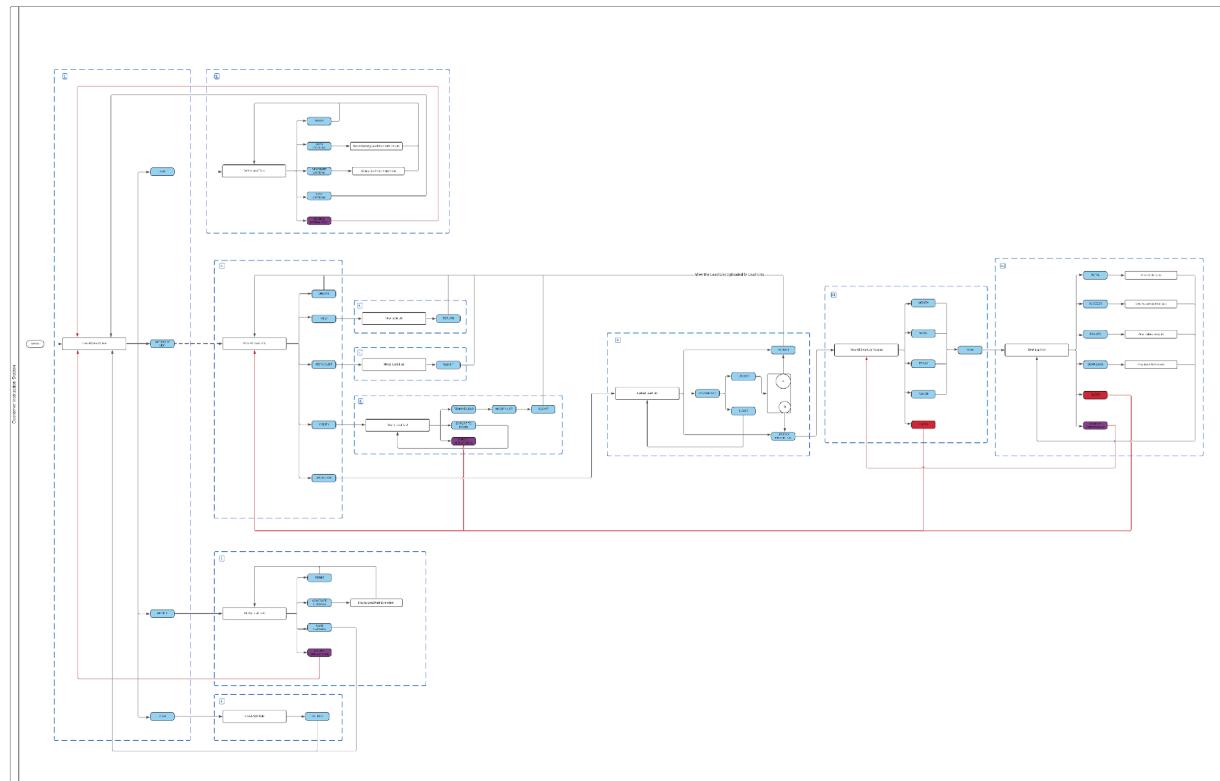
Lead List Management L2 View.png



Lead List Management Flow Diagram (L3 View)



Lead List Management L3 View.png

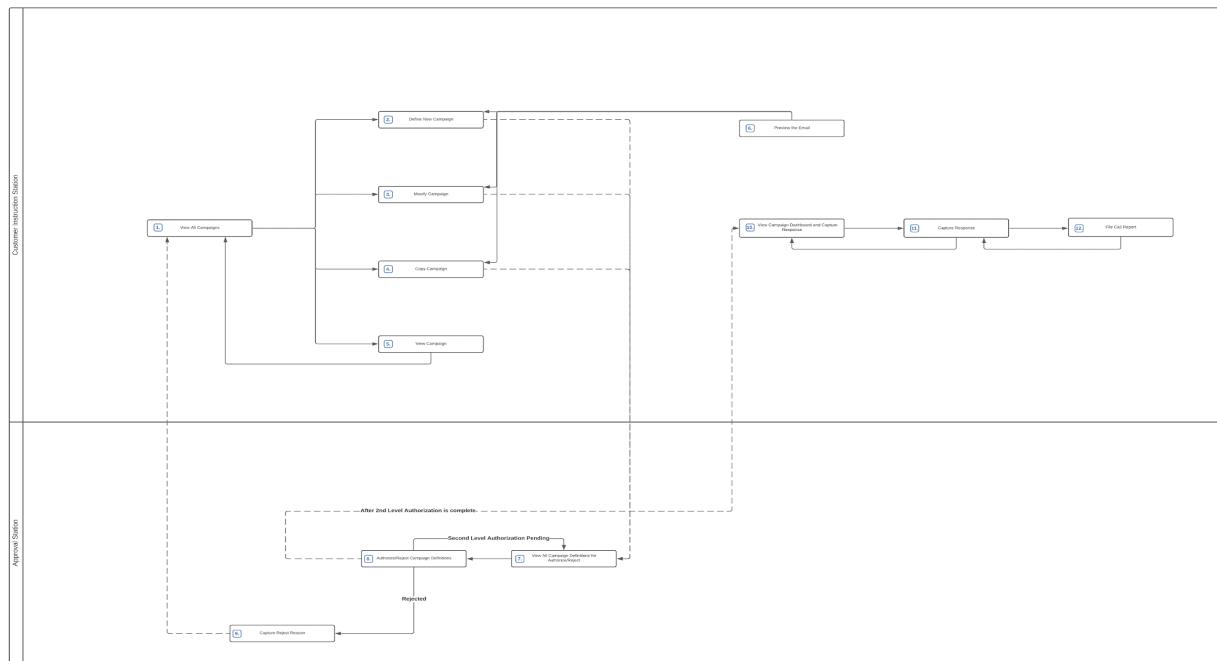


Lead List Management Flow Diagram (L4 View)



Lead List Management L4 View.png

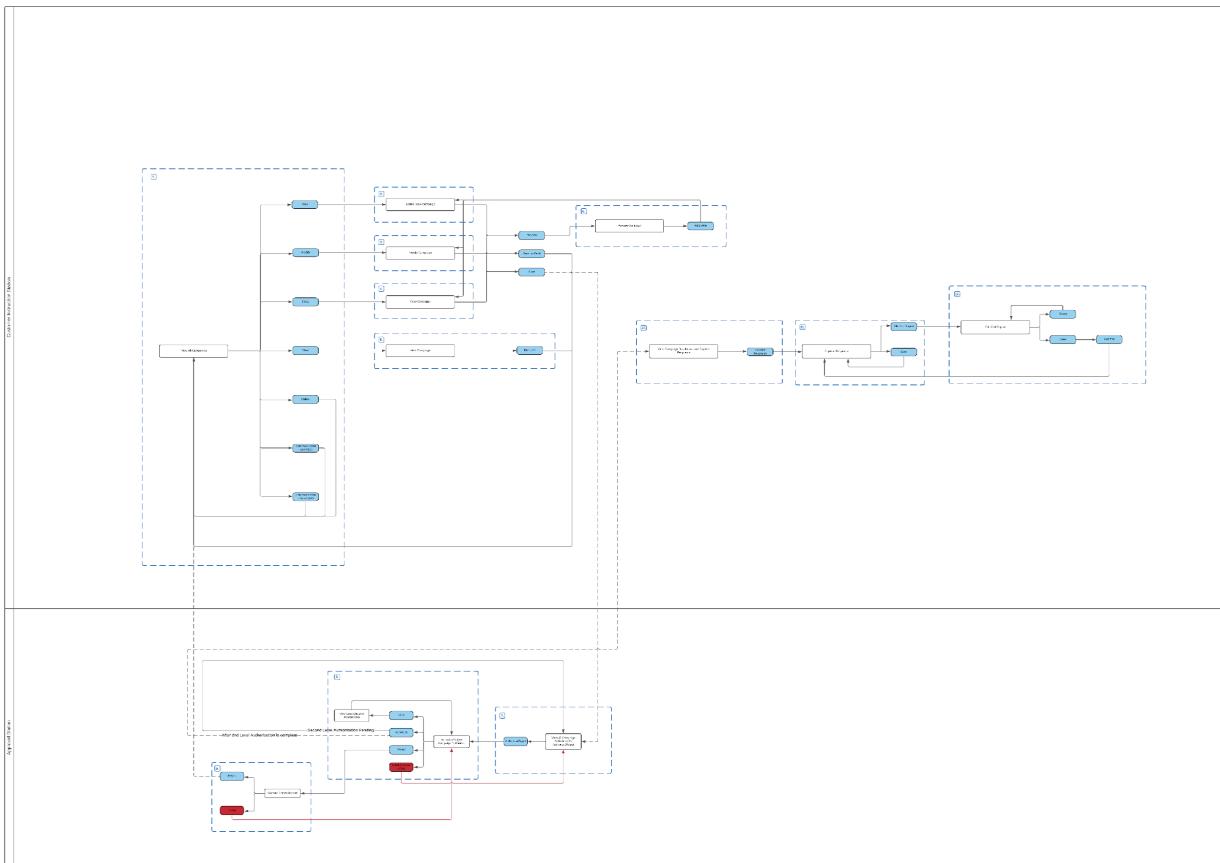
2. The below three flow diagrams reflects the process flow for Campaign Management at L2, L3 and L4 level



Campaign Management Flow Diagram (L2 View)



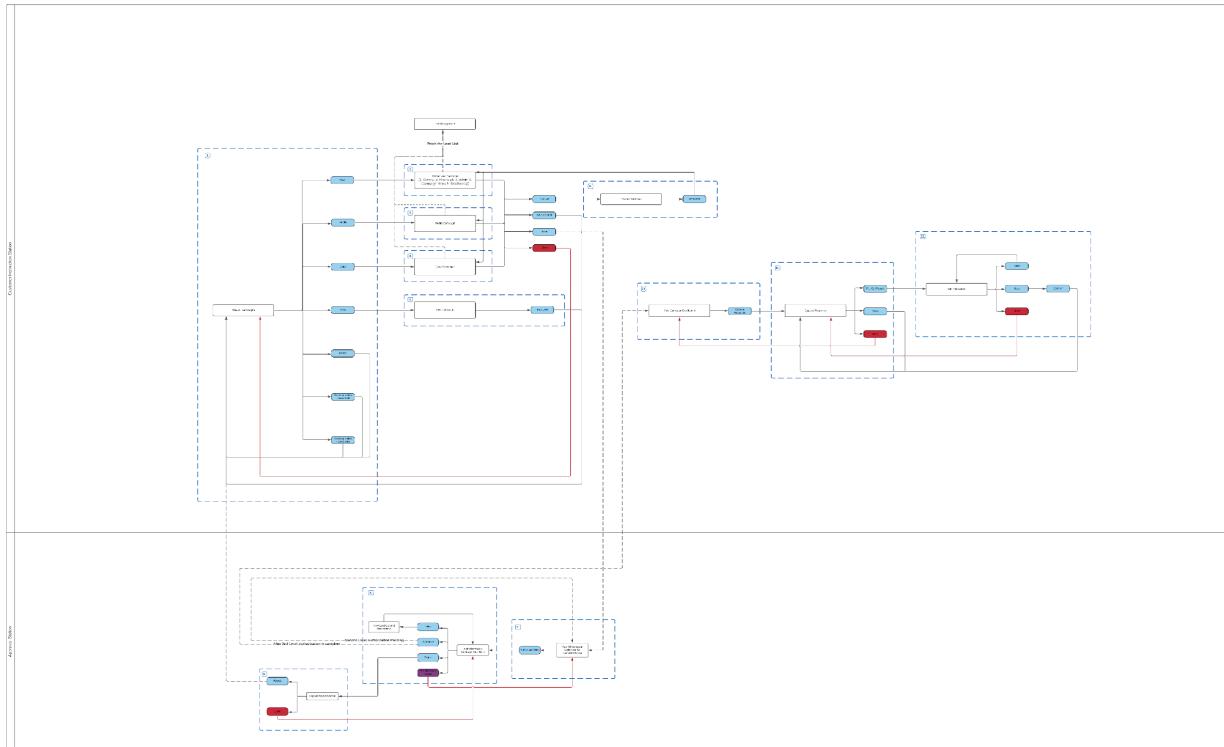
Campaign Management L2 View.png



Campaign Management Flow Diagram (L3 View)



Campaign Management L3 View.png



Campaign Management Flow Diagram (L4 View)



Campaign Management L4 View.png

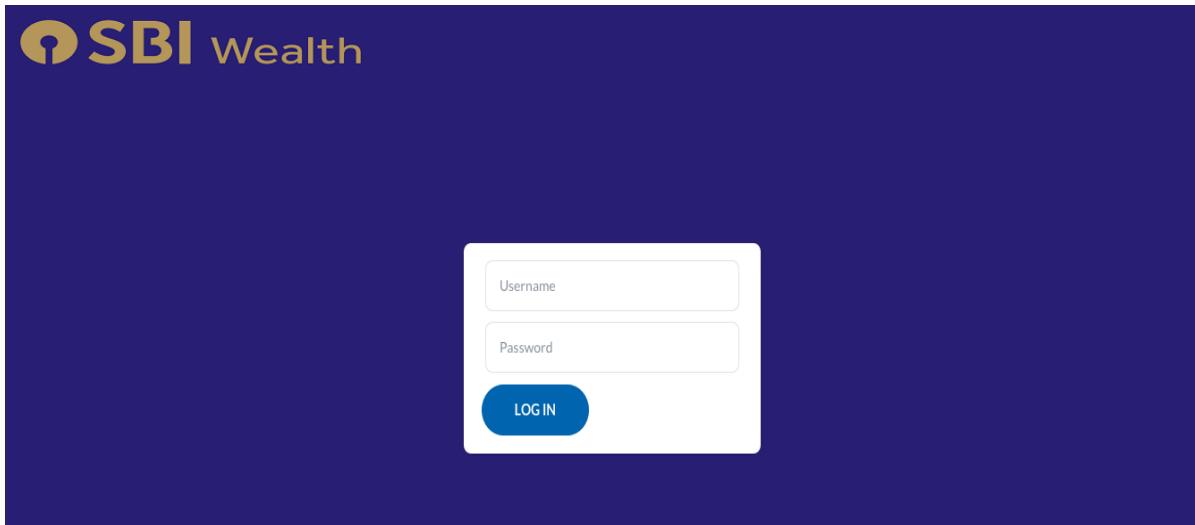
4. Process Description

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

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

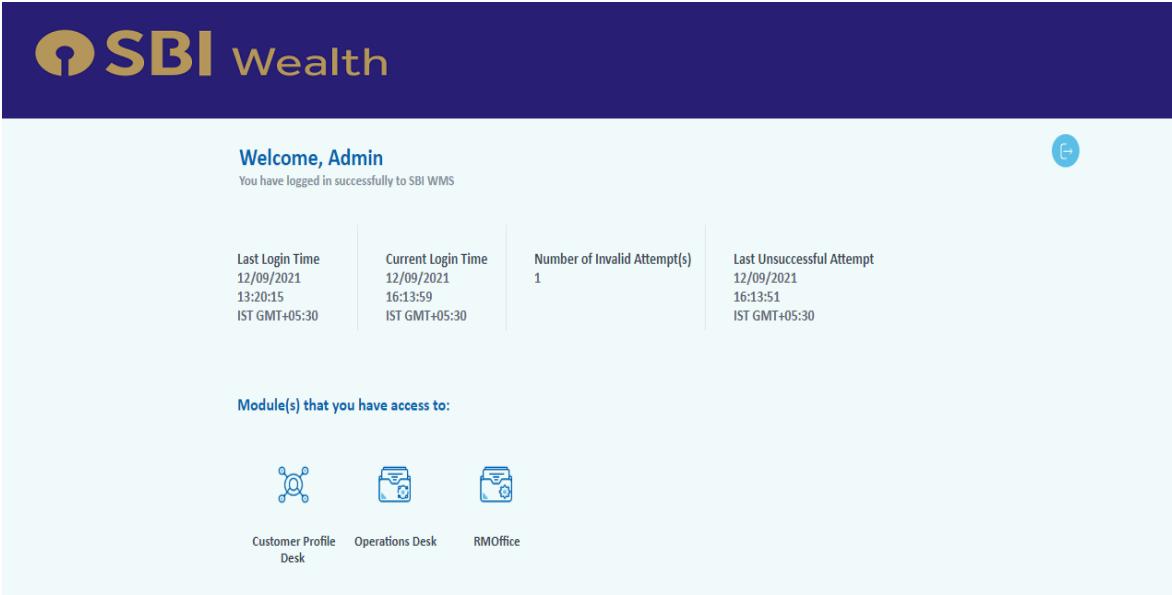
4.1 Login

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



Screen: Launch the application

- 2 Once logged in, the User clicks on “Customer Profile Desk ” to launch the CRM application



Welcome, Admin
You have logged in successfully to SBI WMS

Last Login Time 12/09/2021 13:20:15 IST GMT+05:30	Current Login Time 12/09/2021 16:13:59 IST GMT+05:30	Number of Invalid Attempt(s) 1	Last Unsuccessful Attempt 12/09/2021 16:13:51 IST GMT+05:30
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Module(s) that you have access to:

		
Customer Profile Desk	Operations Desk	RMO Office

Screen: Select Customer Profile Desk

4.2 Lead List Management

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

- Automatic Lead Generation
- Lead Upload
- Manual Lead Creation

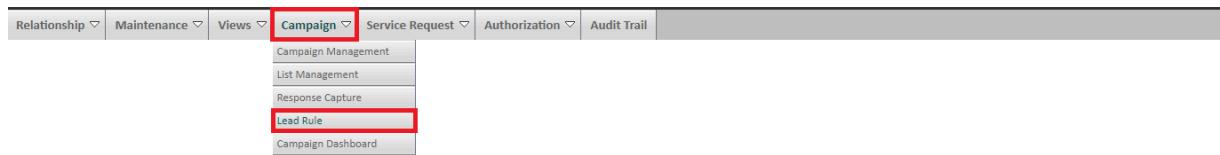
4.2.1 Automatic Lead Generation

The leads are identified automatically from the existing customers' on boarded 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 Rule 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. All the existing lead rules already created can be viewed by the user. The user can perform the following actions in Lead Rule:

- Add Lead Rule
 - View an existing Lead Rule
 - Modify an existing Lead Rule
 - Generate List
- User hovers on the "Campaign" menu and selects the "Lead Rule" sub menu



Screen: Lead Rule Screen Navigation

- User views the lead rules defined in the system

Campaign >> Lead Rule					
<input type="radio"/> Add		<input type="radio"/> View		<input type="radio"/> Modify	
Criteria Id	Criteria Name	Criteria	Status	Owner Id	Creation Date
00001134	test1dateof birth	BIRTHDAY = '05-Jul-2018'	Authorized	PRDREQ1-RAJANEE	29-AUG-2018
00001136	enttest	GENDER = 'M'	Authorized	PRDREQ1-RAJANEE	25-AUG-2018
00001141	Currency criteria	CITIZENSHIP != 'TH'	Authorized	PRDREQ1-RAJANEE	29-AUG-2018
00001143	Aug291Leadrule2	CLIENTSEGMENT = 'Mass' AND TOTALAUM > 10000000	Authorized	PRDREQ1-RAJANEE	29-AUG-2018
00001147	AUMBETWEEN	TOTALAUM BETWEEN 10 AND 10000000	Authorized	PRDREQ1-RAJANEE	29-AUG-2018
00001148	cfcreationbetween	CFCREATIONDATE BETWEEN '05-Jul-19...' AND '01-Jul-2018'	Authorized	PRDREQ1-RAJANEE	29-AUG-2018
00001149	mmm	GLOBALEQUITYLASTPURCHASE = '01-Jul-2018'	Authorized	PRDREQ1-RAJANEE	29-AUG-2018
00001154	sep4leadrule2	AGE > 20	Authorized	PRDREQ1-RAJANEE	05-SEP-2018
00001171	RULE_19	CLIENTSEGMENT = 'Mass' AND TOTALAUM > 10000000	Authorized	PRDREQ1-RAJANEE	19-SEP-2018
00001129	aug231male	GENDER = 'M'	Authorized	OPSMAKER1-JASON	23-AUG-2018
00001131	aug233	AGE > 10	Authorized	OPSMAKER1-JASON	23-AUG-2018
00001142	Aug291Leadrule1	ZIPCODE LIKE('1%')	Authorized	PRDREQ1-RAJANEE	29-AUG-2018
00001144	aug293LeadRule3	GENDER = 'M'	Authorized	PRDREQ1-RAJANEE	29-AUG-2018
00001150	Aug301R1	TOTALAUM > 100000	Authorized	PRDREQ1-RAJANEE	30-AUG-2018
00001151	aug301LR2	TOTALAUM > 200000	Authorized	PRDREQ1-RAJANEE	30-AUG-2018
00001152	Sep01LR1	AGE > 26	Authorized	PRDREQ1-RAJANEE	01-SEP-2018
00001156	8 Sept_New List	AGE > 20	Authorized	PRDREQ1-RAJANEE	08-SEP-2018
00001157	AUM Holdings_September8	NOT (TOTALAUM > 4500 AND LOANSH...)	Authorized	PRDREQ1-RAJANEE	08-SEP-2018
00001162	Sep12leadrule1	CLIENTSEGMENT = 'Mass' OR TOTALAUM > 10000000	Authorized	PRDREQ1-RAJANEE	12-SEP-2018
00001165	Sep143LR3	AGE > 10	Authorized	PRDREQ1-RAJANEE	14-SEP-2018

Screen: View All Lead Rules

4.2.1.2 Add Lead Rule

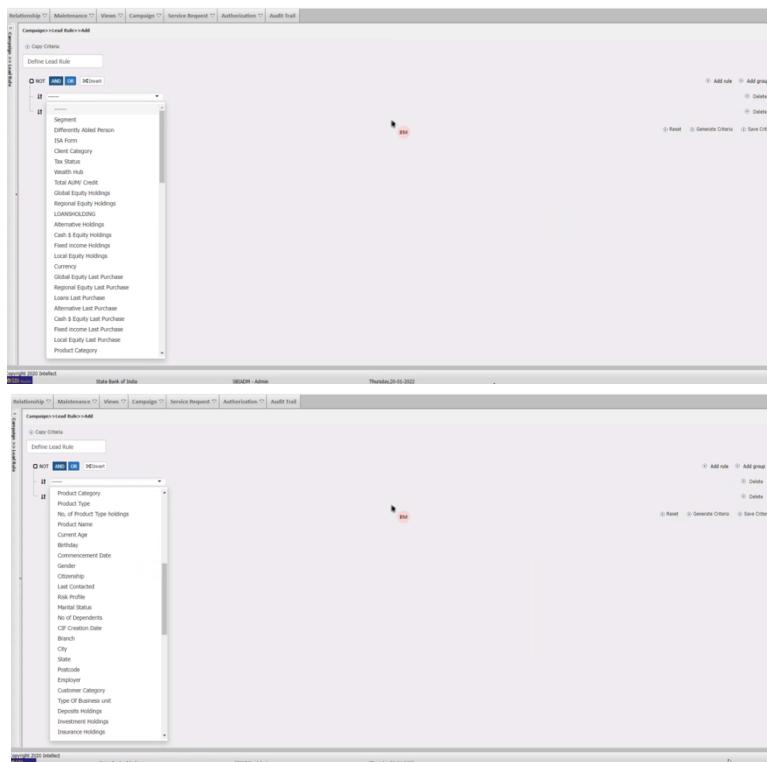
Add Lead Rule is used to add the rule criteria based on which the existing customer records will be filtered to create a list of potential targets for a campaign

- User clicks on the "Add" to add a new lead rule

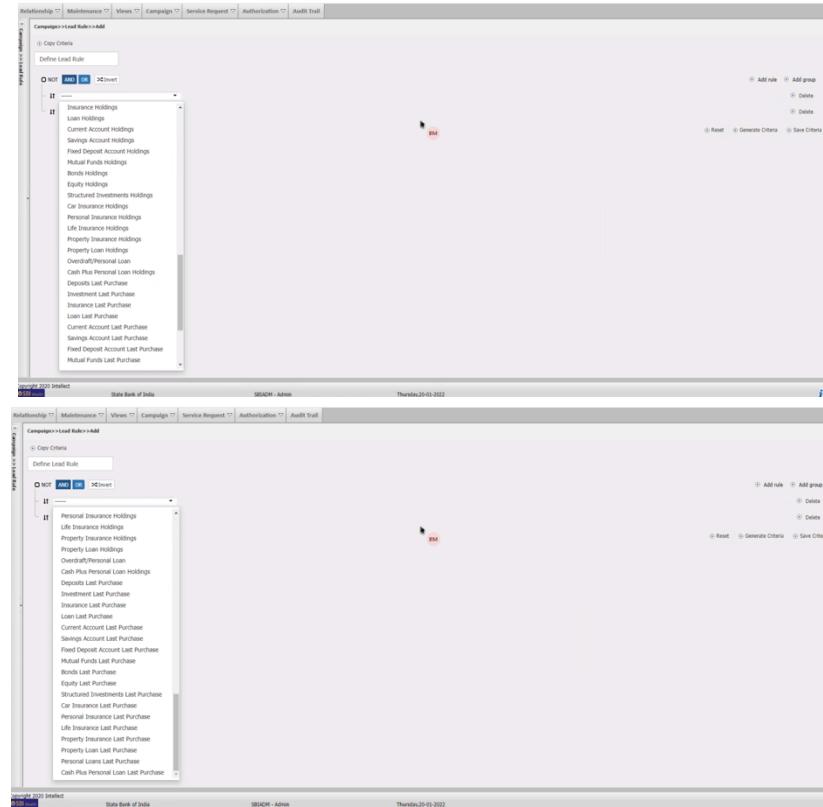
Campaign >> Lead Rule					
<input type="radio"/> Add	<input type="radio"/> View	<input type="radio"/> Modify	<input type="radio"/> Generate List		
Criteria Id	Criteria Name	Criteria	Status	Owner Id	Creation Date
00001134	test11dateofbirth	BIRTHDAY = '05-Jul-2018'	Authorized	PRDREQ1-RAJANEE	29-AUG-2018
00001136	emtest	GENDER = 'M'	Authorized	PRDREQ1-RAJANEE	25-AUG-2018
00001141	Currency criteria	CITIZENSHIP != 'TH'	Authorized	PRDREQ1-RAJANEE	29-AUG-2018
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00001147	AUMBETWEEN	TOTALAUM BETWEEN 10 AND 10000000	Authorized	PRDREQ1-RAJANEE	29-AUG-2018
00001148	cifcreationbetween	CIFCREATIONDATE BETWEEN '05-Jul-19...	Authorized	PRDREQ1-RAJANEE	29-AUG-2018
00001149	mmmm	GLOBALEQUITYLASTPURCHASE = '01-Jul..	Authorized	PRDREQ1-RAJANEE	29-AUG-2018
00001154	sep4leadrule2	AGE > 20	Authorized	PRDREQ1-RAJANEE	05-SEP-2018
00001171	RULE_19	CLIENTSEGMENT = 'Mass' AND TOTALA...	Authorized	PRDREQ1-RAJANEE	19-SEP-2018
00001129	aug231male	GENDER = 'M'	Authorized	OPSMAKER1-JASON	23-AUG-2018
00001131	aug233	AGE > 10	Authorized	OPSMAKER1-JASON	23-AUG-2018
00001142	Aug291Leadrule1	ZIPCODE LIKE('1%')	Authorized	PRDREQ1-RAJANEE	29-AUG-2018
00001144	aug293LeadRule3	GENDER = 'M'	Authorized	PRDREQ1-RAJANEE	29-AUG-2018
00001150	Aug301LR1	TOTALAUM > 100000	Authorized	PRDREQ1-RAJANEE	30-AUG-2018
00001151	aug301LR2	TOTALAUM > 200000	Authorized	PRDREQ1-RAJANEE	30-AUG-2018
00001152	Sep01LR1	AGE > 26	Authorized	PRDREQ1-RAJANEE	01-SEP-2018
00001156	8 Sept_New List	AGE > 20	Authorized	PRDREQ1-RAJANEE	08-SEP-2018
00001157	AUM Holdings_September8	NOT (TOTALAUM > 4500 AND LOANSH...	Authorized	PRDREQ1-RAJANEE	08-SEP-2018
00001162	Sep12leadrule1	CLIENTSEGMENT = 'Mass OR TOTALAU...	Authorized	PRDREQ1-RAJANEE	12-SEP-2018
00001165	Sep143LR3	AGE > 10	Authorized	PRDREQ1-RAJANEE	14-SEP-2018

Screen: Define Lead Rule Screen Navigation

2. User inputs the “Criteria Name” and views the list of criteria for lead rule definition



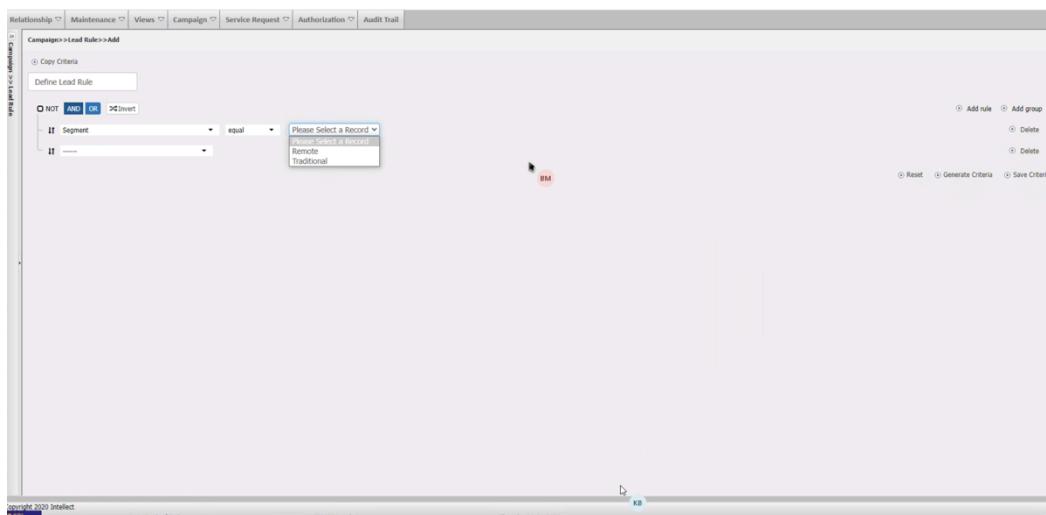
The image consists of two side-by-side screenshots of a software application's interface. Both screenshots show a 'Define Lead Rule' dialog box with a 'Criteria' dropdown menu open. The left screenshot shows the dropdown menu expanded with many options like 'Segment', 'Differently Abled Person', 'ISA Form', etc. The right screenshot shows a different set of criteria options, including 'Product Category', 'Product Type', 'No. of Alternative Holdings', 'Product Name', 'Current Age', 'Birthdate', 'Commemoration Date', 'Gender', 'Citizenship', 'Last Checked', 'Risk Profile', 'Marital Status', 'No. of Dependents', 'CIF Creation Date', 'Branch', 'City', 'State', 'Postcode', 'Employer', 'Customer Category', 'Type Of Business Unit', 'Depository Holdings', 'Investment Holdings', and 'Insurance Holdings'. Both screenshots have a top navigation bar with tabs like Relationship, Maintenance, Views, Campaign, Service Request, Authorization, and Audit Trail.



The screenshot shows a software interface for defining lead rules. At the top, there are tabs for Relationship, Maintenance, Views, Campaign, Service Request, Authorization, and Audit Trail. Below these, a sub-menu for 'Campaigns > Lead Rule > Add' is open. A 'Copy Criteria' option is selected. A 'Define Lead Rule' dialog box is displayed, containing a 'NOT AND OR Invert' section and a list of criteria names. Two dropdown menus are open, showing lists of financial and insurance-related holdings and purchases. The interface includes standard buttons for Add rule, Add group, Delete, Reset, Generate Criteria, and Save Criteria.

Screen: Define Lead Rule - Enter Criteria Name and View List of Criteria

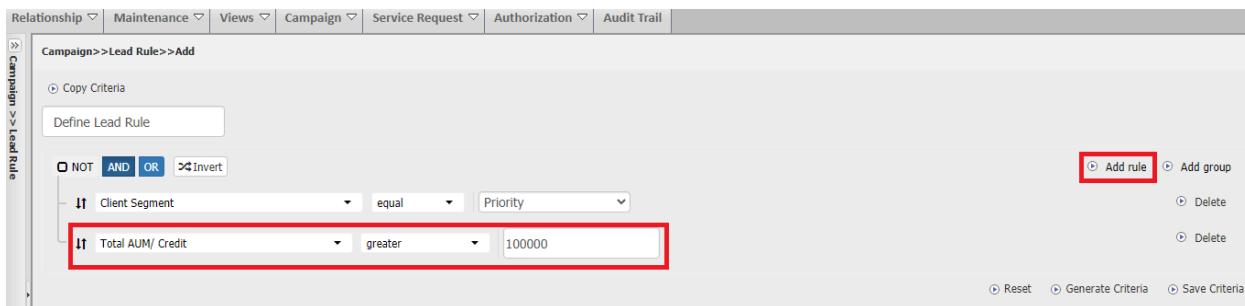
3. User selects the criteria from the dropdown list, mathematical operation and the criteria value. In the below example (Criteria - Client Segment, Mathematical Operation - Equal, Criteria Value - Priority)



The screenshot shows the 'Lead Rule Criteria' screen. It features a 'Relationship', 'Maintenance', 'Views', 'Campaigns', 'Service Request', 'Authorization', and 'Audit Trail' navigation bar. A 'Campaigns > Lead Rule > Add' sub-menu is active. A 'Please Select a Record' dropdown menu is open, listing 'Segment', 'Remote', and 'Traditional'. The interface includes standard buttons for Add rule, Add group, Delete, Reset, Generate Criteria, and Save Criteria.

Screen: Lead Rule Criteria

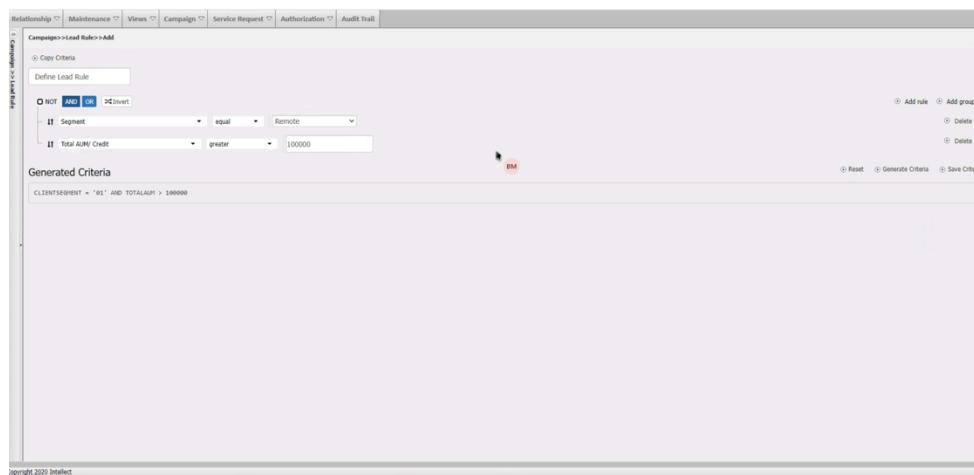
- a. Users can add rules to the existing rule present by clicking on the “Add Rule”. The below example has two criteria:
 - i. Client Segment is equal to Priority
 - ii. Total AUM/Credit greater than 100000 INR



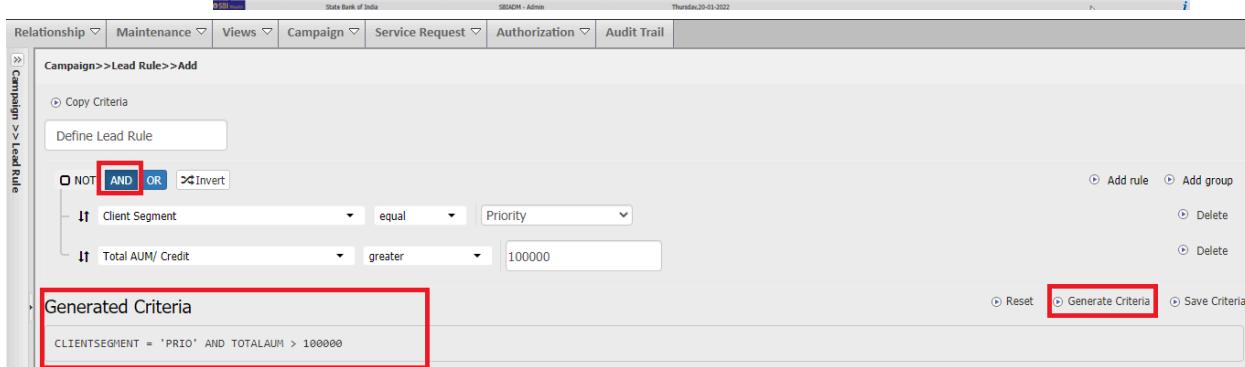
The screenshot shows the "Define Lead Rule" interface. Under the logical operator "AND", there are two criteria: "Client Segment" set to "equal" with "Priority" and "Total AUM/ Credit" set to "greater" with "100000". The "Add rule" button is highlighted with a red box.

Screen: Lead Rule Criteria

- b. Users can join the single criteria with 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 Segment is equal to Priority (AND) Total AUM/Credit greater than 100000 INR



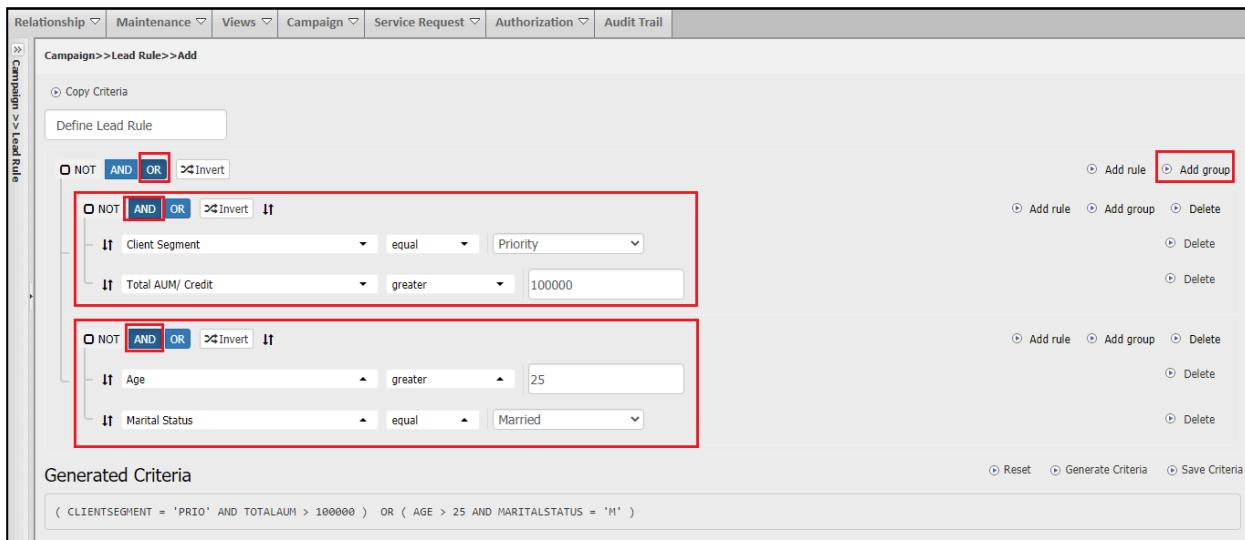
The screenshot shows the "Generated Criteria" section which displays the generated SQL-like criteria: "CLIENTSEGMENT = 'PRI' AND TOTALAUM > 100000".



The screenshot shows the "Generated Criteria" section which displays the generated SQL-like criteria: "CLIENTSEGMENT = 'PRI' AND TOTALAUM > 100000". The "Generate Criteria" button is highlighted with a red box.

Screen: Generate Criteria

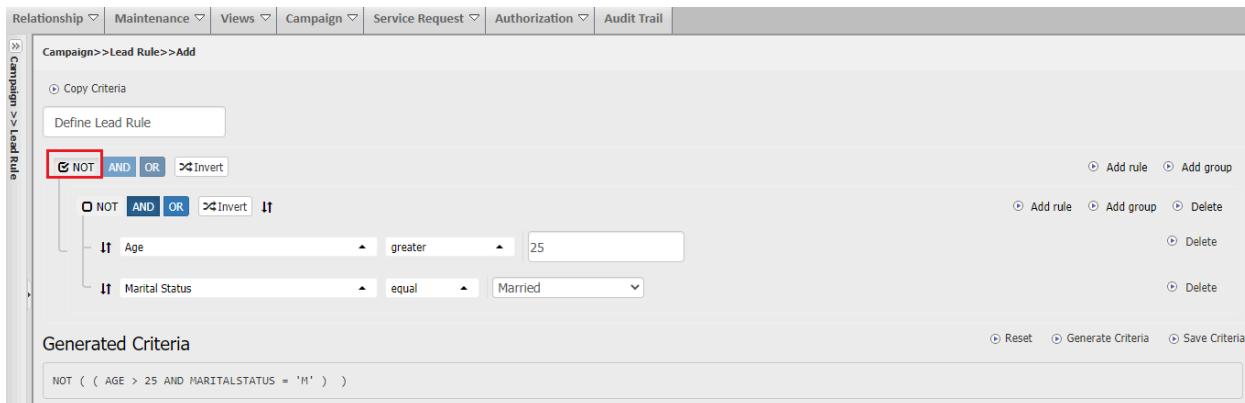
- c. Users can join the multiple criteria with Logical Operator (AND, OR) by clicking on “Add Group”. The below example has two - criterion joined with the “OR” logical operator
- (Client Segment is equal to Priority (AND) Total AUM/Credit greater than 100000 INR) **OR** (Age greater than 25 (AND) Marital Status is Married)



The screenshot shows the "Define Lead Rule" interface. It displays a complex logical expression under "Generated Criteria": `(CLIENTSEGMENT = 'PRIO' AND TOTALAUM > 100000) OR (AGE > 25 AND MARITALSTATUS = 'M')`. The expression is composed of two main groups connected by an OR operator. Each group contains an AND operator connecting multiple criteria. The first group checks if Client Segment is equal to 'Priority' and if Total AUM/Credit is greater than 100000. The second group checks if Age is greater than 25 and if Marital Status is equal to 'Married'. Red boxes highlight the logical operators AND, OR, and NOT, as well as the generated criteria line.

Screen: Lead Rule Criteria

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



The screenshot shows the "Define Lead Rule" interface. It displays a logical expression under "Generated Criteria": `NOT ((AGE > 25 AND MARITALSTATUS = 'M'))`. A red box highlights the NOT operator, which negates the entire group of criteria that follows it: "Age greater than 25 AND Marital Status is Married".

Screen: Lead Rule Criteria

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

Campaign >> Lead Rule >> Add

Define Lead Rule

NOT AND OR Invert

Age less or equal 25

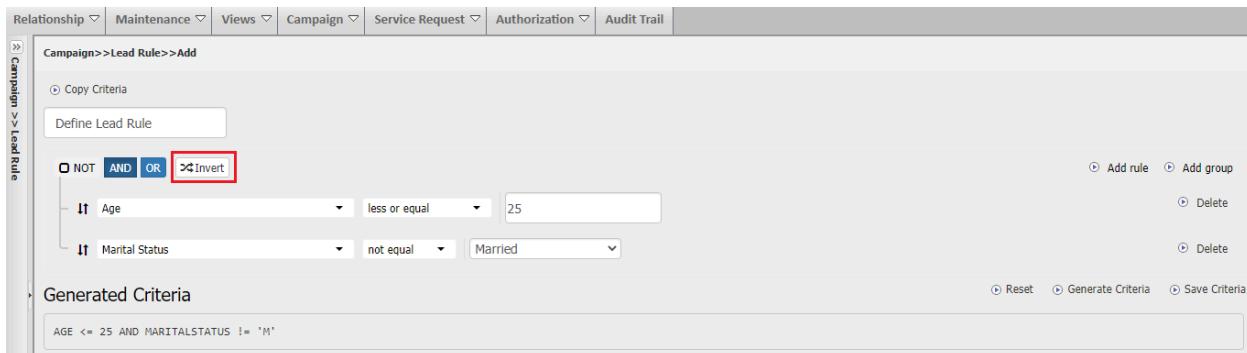
Marital Status not equal Married

Add rule Add group Delete

Generated Criteria

AGE <= 25 AND MARITALSTATUS != 'M'

Reset Generate Criteria Save Criteria



Screen: Lead Rule Criteria

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

Campaign >> Lead Rule >> Add

Define Lead Rule

NOT AND OR Invert

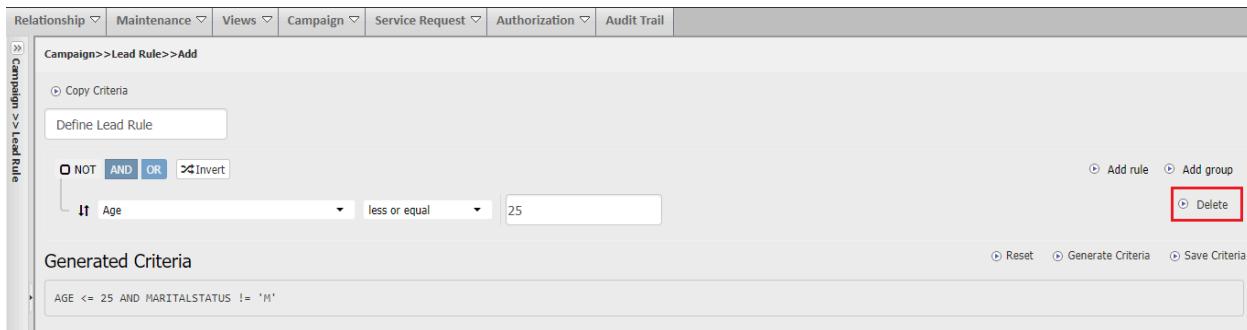
Age less or equal 25

Add rule Add group Delete

Generated Criteria

AGE <= 25 AND MARITALSTATUS != 'M'

Reset Generate Criteria Save Criteria



Screen: Lead Rule Criteria

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

Campaign >> Lead Rule >> Add

Enter Criteria Name

NOT AND OR Invert

Add rule Add group Delete Reset Generate Criteria Save Criteria



Screen: Reset Criteria

- 4. 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

Relationship ▾ Maintenance ▾ Views ▾ Campaign ▾ Service Request ▾ Authorization ▾ Audit Trail

Campaign >> Lead Rule >> Add

Copy Criteria

Please Select

- Customer AUM Condition
- Customer with AUM Condition 1
- Aggressive Risk Profile Customers
- Customers with Conservative Risk Profile
- customers with AUM 1000
- Customers with AUM 10000
- Customers with AUM 50000
- Customers with Conservative Risk Profile
- Customers with Aggressive Risk Profile
- AUM > 500000 and Conservative Customers**
- Investment AUM > 100000
- InvestmentHoldings
- Segment Priority
- 10 Aug Investment Holdings
- 10 Aug Segment
- Aug 10 Total AUM
- 10 Aug Currency IDR
- 10 Aug
- 10 Aug Product Name
- 10 Aug Savings

Add rule Add group
 Delete
 Reset Generate Criteria Save Criteria

Relationship ▾ Maintenance ▾ Views ▾ Campaign ▾ Service Request ▾ Authorization ▾ Audit Trail

Campaign >> Lead Rule >> Add

Copy Criteria

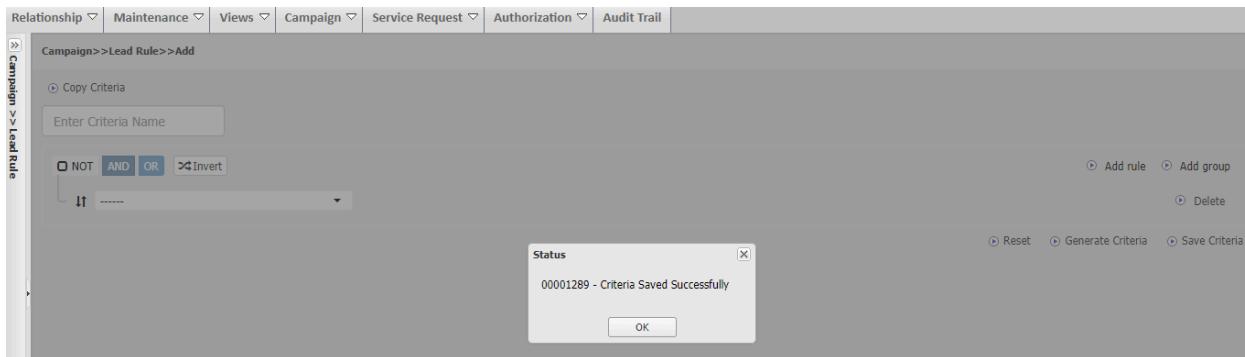
Please Select

- Please Select
- Jan30
- Sanity_10Feb2020**
- Sanity_Add_10Feb2020
- qwertyulop
- age criteria
- age criteria
- CCY096
- test
- Sanity
- 3rd March
- Malaysia_Currency
- Sanity_Test
- Jan30_2
- Jan30_3
- qwerty1
- Family Office
- abc
- nationality
- Currency Malaysia

Add rule Add group
 Delete
 Reset Generate Criteria Save Criteria

Screen: Copy Criteria

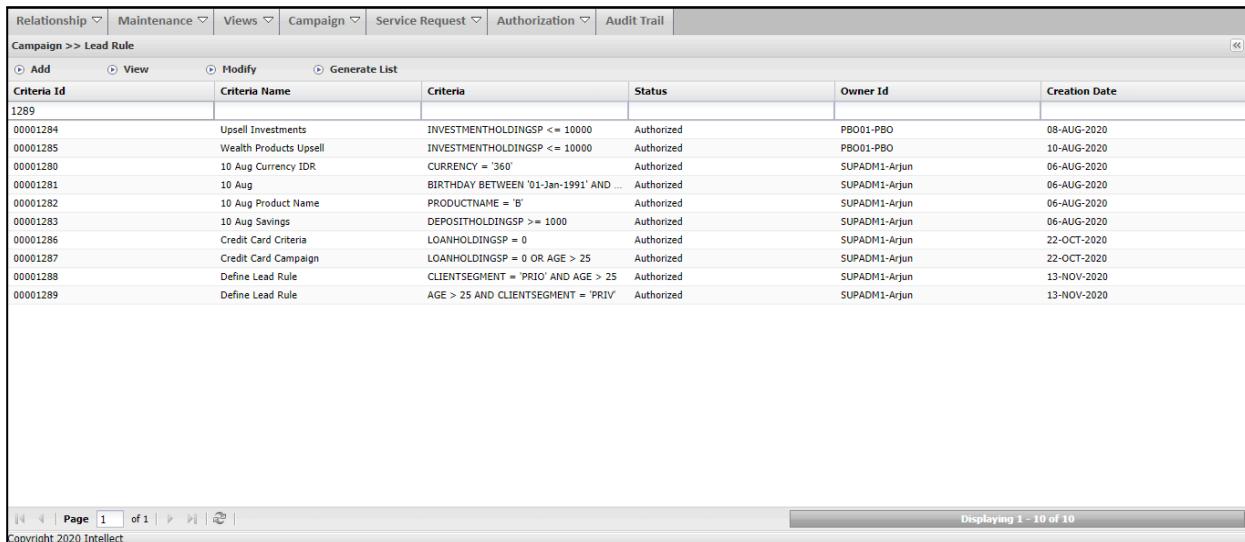
5. User creates the criteria using the above mentioned steps and clicks on “Save Criteria” to save the lead rule



The screenshot shows a software interface for saving lead rule criteria. At the top, there's a navigation bar with tabs like Relationship, Maintenance, Views, Campaign, Service Request, Authorization, and Audit Trail. Below the navigation bar, the title 'Campaign >> Lead Rule >> Add' is displayed. A sub-navigation bar on the left says 'Campaign >> Lead Rule'. The main area has a form with fields for 'Enter Criteria Name' and a logic builder with options for NOT, AND, OR, and Invert. On the right, there are buttons for 'Add rule', 'Add group', 'Delete', 'Reset', 'Generate Criteria', and 'Save Criteria'. A small modal window titled 'Status' is open, displaying the message '00001289 - Criteria Saved Successfully' with an 'OK' button.

Screen: Save Lead Rule Criteria

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



The screenshot shows a list of lead rule criteria records. The top navigation bar is identical to the previous screenshot. The main area displays a table with columns: Criteria Id, Criteria Name, Criteria, Status, Owner Id, and Creation Date. The table contains 10 rows of data. At the bottom, there are page navigation buttons and a message 'Displaying 1 - 10 of 10'.

Criteria Id	Criteria Name	Criteria	Status	Owner Id	Creation Date
1289	Upsell Investments	INVESTMENTHOLDINGSP <= 10000	Authorized	PBO01-PBO	08-AUG-2020
00001284	Wealth Products Upsell	INVESTMENTHOLDINGSP <= 10000	Authorized	PBO01-PBO	10-AUG-2020
00001280	10 Aug Currency IDR	CURRENCY = '360'	Authorized	SUPADM1-Arjun	06-AUG-2020
00001281	10 Aug	BIRTHDAY BETWEEN '01-Jan-1991' AND ...	Authorized	SUPADM1-Arjun	06-AUG-2020
00001282	10 Aug Product Name	PRODUCTNAME = 'B'	Authorized	SUPADM1-Arjun	06-AUG-2020
00001283	10 Aug Savings	DEPOSITHOLDINGSP >= 1000	Authorized	SUPADM1-Arjun	06-AUG-2020
00001286	Credit Card Criteria	LOANHOLDINGSP = 0	Authorized	SUPADM1-Arjun	22-OCT-2020
00001287	Credit Card Campaign	LOANHOLDINGSP = 0 OR AGE > 25	Authorized	SUPADM1-Arjun	22-OCT-2020
00001288	Define Lead Rule	CLIENTSEGMENT = 'PRO' AND AGE > 25	Authorized	SUPADM1-Arjun	13-NOV-2020
00001289	Define Lead Rule	AGE > 25 AND CLIENTSEGMENT = 'PRIV'	Authorized	SUPADM1-Arjun	13-NOV-2020

Screen: View Lead Rule Criteria Record

4.2.1.3 Modify Lead Rule

The Lead Rule criteria added can be modified and saved

1. User selects the criteria record and clicks on the "Modify" button to modify a lead rule

Campaign >> Lead Rule					
<input type="radio"/> Add	<input type="radio"/> View	<input checked="" type="radio"/> Modify	<input type="radio"/> Generate List		
Criteria Id	Criteria Name	Criteria	Status	Owner Id	Creation Date
00001134	test1dateofbirth	BIRTHDAY = '05-Jul-2018'	Authorized	PRDREQ1-RAJANEE	29-AUG-2018
00001136	entest	GENDER = 'M'	Authorized	PRDREQ1-RAJANEE	25-AUG-2018
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00001143	Aug291Leadrule2	CLIENTSEGMENT = 'Mass' AND TOTALAUM > 10 AND 10000000	Authorized	PRDREQ1-RAJANEE	29-AUG-2018
00001147	AUMBETWEEN	TOTALAUM BETWEEN 10 AND 10000000	Authorized	PRDREQ1-RAJANEE	29-AUG-2018
00001148	cifcreationbetween	CIFCREATIONDATE BETWEEN '05-Jul-19...' AND '01-Jul-2018'	Authorized	PRDREQ1-RAJANEE	29-AUG-2018
00001149	mmm	GLOBALSEQUITYLASTPURCHASE = '01-Jul-2018'	Authorized	PRDREQ1-RAJANEE	29-AUG-2018
00001154	sep4leadrule2	AGE > 20	Authorized	PRDREQ1-RAJANEE	05-SEP-2018
00001171	RULE_19	CLIENTSEGMENT = 'Mass' AND TOTALAUM > 10000000	Authorized	PRDREQ1-RAJANEE	19-SEP-2018
00001129	aug231male	GENDER = 'M'	Authorized	OPSMAKER1-JASON	23-AUG-2018
00001131	aug233	AGE > 10	Authorized	OPSMAKER1-JASON	23-AUG-2018
00001142	Aug291Leadrule1	ZIPCODE LIKE('1%')	Authorized	PRDREQ1-RAJANEE	29-AUG-2018
00001144	aug293LeadRule3	GENDER = 'M'	Authorized	PRDREQ1-RAJANEE	29-AUG-2018
00001150	Aug301LR1	TOTALAUM > 100000	Authorized	PRDREQ1-RAJANEE	30-AUG-2018
00001151	aug301LR2	TOTALAUM > 200000	Authorized	PRDREQ1-RAJANEE	30-AUG-2018
00001152	Sep01LR1	AGE > 26	Authorized	PRDREQ1-RAJANEE	01-SEP-2018
00001156	8 Sept_New List	AGE > 20	Authorized	PRDREQ1-RAJANEE	08-SEP-2018
00001157	AUM Holdings_September8	NOT (TOTALAUM > 4500 AND LOANSH...)	Authorized	PRDREQ1-RAJANEE	08-SEP-2018
00001162	Sep12Leadrule1	CLIENTSEGMENT = 'Mass' OR TOTALAUM > 10000000	Authorized	PRDREQ1-RAJANEE	12-SEP-2018
00001165	Sep143LR3	AGE > 10	Authorized	PRDREQ1-RAJANEE	14-SEP-2018

Screen: Select Lead Rule Criteria Record for Modification

2. User modifies the criteria

Relationship ▾ Maintenance ▾ Views ▾ Campaign ▾ Service Request ▾ Authorization ▾ Audit Trail					
Campaign>>Lead Rule>>Modify <input type="text" value="sep4leadrule2"/> <input type="checkbox"/> NOT <input type="radio"/> AND <input type="radio"/> OR <input type="button" value="Invert"/> <input type="radio"/> Add rule <input type="radio"/> Add group <input type="radio"/> Delete					
<input type="radio"/> If Age greater 20 <input type="radio"/> Reset <input type="radio"/> Generate Criteria <input type="radio"/> Save Criteria					

Screen: Modify Lead Rule Criteria

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

Relationship ▾ Maintenance ▾ Views ▾ Campaign ▾ Service Request ▾ Authorization ▾ Audit Trail					
Campaign>>Lead Rule>>Modify <input type="text" value="Enter Criteria Name"/> <input type="radio"/> NOT <input type="radio"/> AND <input type="radio"/> OR <input type="radio"/> Invert					
<input type="radio"/> Add rule <input type="radio"/> Add group <input type="radio"/> Delete					
<div style="border: 1px solid black; padding: 5px; text-align: center;"> Status 00001154 - Criteria Modified Successfully <input type="button" value="OK"/> </div>					

Screen: Criteria Modified Successfully

4.2.1.4 View Lead Rule

The Lead Rule criteria can be viewed

- User selects the criteria record and clicks on the “View” button to view a lead rule

Relationship	Maintenance	Views	Campaign	Service Request	Authorization	Audit Trail
Campaign >> Lead Rule						
Add	View	Modify	Generate List			
Criteria Id	Criteria Name	Criteria	Status	Owner Id	Creation Date	
00001134	test1Leadof birth	BIRTHDAY = '05-Jul-2018'	Authorized	PRDREQ1-RAJANEE	29-AUG-2018	
00001136	enttest	GENDER = 'M'	Authorized	PRDREQ1-RAJANEE	25-AUG-2018	
00001141	Currency criteria	CITIZENSHIP != 'TH'	Authorized	PRDREQ1-RAJANEE	29-AUG-2018	
00001143	Aug291Leadrule2	CLIENTSEGMENT = 'Mass' AND TOTALA...	Authorized	PRDREQ1-RAJANEE	29-AUG-2018	
00001147	AUMBETWEEN	TOTALAUM BETWEEN 10 AND 10000000	Authorized	PRDREQ1-RAJANEE	29-AUG-2018	
00001148	cifcreationbetween	CIFCREATIONDATE BETWEEN '05-Jul-19...	Authorized	PRDREQ1-RAJANEE	29-AUG-2018	
00001149	mmm	GLOBALSEQUITYLASTPURCHASE = '01-Jul...	Authorized	PRDREQ1-RAJANEE	29-AUG-2018	
00001154	sep4leadrule2	AGE > 20	Authorized	SUPADMIN-Arjun	13-NOV-2020	
00001171	RULE_19	CLIENTSEGMENT = 'Mass' AND TOTALA...	Authorized	PRDREQ1-RAJANEE	19-SEP-2018	
00001129	aug231male	GENDER = 'M'	Authorized	OPSMAKER1-JASON	23-AUG-2018	
00001131	aug233	AGE > 10	Authorized	OPSMAKER1-JASON	23-AUG-2018	
00001142	Aug291Leadrule1	ZIPCODE LIKE('1%')	Authorized	PRDREQ1-RAJANEE	29-AUG-2018	
00001144	aug293LeadRule3	GENDER = 'M'	Authorized	PRDREQ1-RAJANEE	29-AUG-2018	
00001150	Aug301R1	TOTALAUM > 100000	Authorized	PRDREQ1-RAJANEE	30-AUG-2018	
00001151	aug301LR2	TOTALAUM > 200000	Authorized	PRDREQ1-RAJANEE	30-AUG-2018	
00001152	Sep01LR1	AGE > 26	Authorized	PRDREQ1-RAJANEE	01-SEP-2018	
00001156	8 Sept_New List	AGE > 20	Authorized	PRDREQ1-RAJANEE	08-SEP-2018	
00001157	AUM Holdings_September8	NOT (TOTALAUM > 4500 AND LOANSH...	Authorized	PRDREQ1-RAJANEE	08-SEP-2018	
00001162	Sep12Leadrule1	CLIENTSEGMENT = 'Mass' OR TOTALAU...	Authorized	PRDREQ1-RAJANEE	12-SEP-2018	
00001165	Sep143LR3	AGE > 10	Authorized	PRDREQ1-RAJANEE	14-SEP-2018	

Screen: Select Lead Rule Criteria Record for View

- User views the criteria and clicks on the double arrow on the left top to return to the “View All Lead Rules” screen

Relationship	Maintenance	Views	Campaign	Service Request	Authorization	Audit Trail
Campaign>>Lead Rule>>View						
<input type="text" value="Aug301R1"/> <input type="checkbox"/> NOT <input type="radio"/> AND <input type="radio"/> OR <input type="checkbox"/> Invert						
<div style="border: 1px solid #ccc; padding: 5px;"> If Total AUM/ Credit greater 100000 </div>						

Screen: View Lead Rule Criteria

4.2.1.5 Generate List

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

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

Relationship	Maintenance	Views	Campaign	Service Request	Authorization	Audit Trail
Campaign >> Lead Rule						
Criteria Id	Criteria Name	Criteria	Status	Owner Id	Creation Date	
00001284	Upsell Investments	INVESTMENTHOLDINGS <= 10000	Authorized	PBO01-PBO	08-AUG-2020	
00001285	Wealth Products Upsell	INVESTMENTHOLDINGS <= 10000	Authorized	PBO01-PBO	10-AUG-2020	
00001280	10 Aug Currency IDR	CURRENCY = '360'	Authorized	SUPADM1-Arjun	06-AUG-2020	
00001281	10 Aug	BIRTHDAY BETWEEN '01-Jan-1991' AND ...	Authorized	SUPADM1-Arjun	06-AUG-2020	
00001282	10 Aug Product Name	PRODUCTNAME = 'B'	Authorized	SUPADM1-Arjun	06-AUG-2020	
00001283	10 Aug Savings	DEPOSITHOLDINGS >= 1000	Authorized	SUPADM1-Arjun	06-AUG-2020	
00001286	Credit Card Criteria	LOANHOLDING	Status	SUPADM1-Arjun	22-OCT-2020	
00001287	Credit Card Campaign	LOANHOLDING		SUPADM1-Arjun	22-OCT-2020	
00001288	Define Lead Rule	CLIENTSEGMENT		SUPADM1-Arjun	13-NOV-2020	
00001289	Define Lead Rule	AGE > 25 AND		SUPADM1-Arjun	13-NOV-2020	

LIST1207-List Generated Successfully

OK

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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 4.2.4 List Management)

4.2.2 Lead Upload

The user can upload a list from third party systems (refer to Section 8 Annexure for Upload Template)

4.2.2.1 Upload Lead List

1. User hovers on the “Campaign” menu and selects the “List Management” sub menu

Relationship	Maintenance	Views	Campaign	Service Request	Authorization	Audit Trail
Campaign Management						
			List Management			
			Response Capture			
			Lead Rule			
			Campaign Dashboard			

Screen: Upload Lead List Navigation

2. User clicks on the “Upload List” button. The file upload menu loads up

Relationship		Maintenance	Views	Campaign	Service Request	Authorization	Audit Trail	
Campaign >> List Management View								
	View	Modify	Delete	Merge List	Upload List			
List ID	List Name						Rule Criteria	
LIST1000	22.9.2018.16.47.19.Sep_217						UPLOAD	
LIST1001	Rahul_Merge_RuleCriteria						NOT (TOTALAUM > 4500 AND LOANSHOLDINGS < 5412)	
LIST1002	UPLOAD_CRITERIA.Merge_01						MERGE	
LIST1003	sep25mL1						MERGE	
LIST1004	October_Merge_Rahul_3						NOT (GENDER != 'M' AND CURRENCY = '025')	
LIST1005	October_Merge_Rahul_3						NOT (GENDER != 'M' AND CURRENCY = '025')	
LIST1006	October_Merge_Rahul_4						NOT (GENDER != 'M' AND CURRENCY = '025')	
LIST1007	UPLOAD_CRITERIA.Merge_01						MERGE	
LIST1008	UPLOAD_CRITERIA						MERGE	
LIST1009	November_Merge_Rahul_3						TOTALAUM = 9000 OR GENDER != 'M'	
LIST1010	October_Merge_Rahul_4						TOTALAUM = 9000 OR GENDER != 'M'	
LIST1012	March_Merge_Rahul_3						NOT (LOANSHOLDINGS < 5412 AND GLOBALEQUITYHOLDINGS > 5000)	
LIST1013	March_Merge_Rahul_4						NOT (LOANSHOLDINGS < 5412 AND GLOBALEQUITYHOLDINGS > 5000)	
LIST1014	MARCH_CRITERIA.Merge_01						MERGE	
LIST1015	List Count 1						TOTALAUM > 25	
LIST1016	List Count 2						AGE > 20	
LIST1017	List Count 1						MERGE	
LIST1018	LIST COUNT FINAL						MERGE	
LIST1019	LIST COUNT 3						CUSTOMERCATEGORY = '01'	
LIST1020	LIST COUNT 4						AGE > 18	
LIST1021	LIST COUNT 5						MERGE	

Screen: Upload Lead List Navigation - Upload Lead List

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

Relationship	Maintenance	Views	Campaign	Service Request	Authorization	Audit Trail
Campaign >> List Management >> File Upload File Upload Upload Error Log Upload Type*: <input type="text" value="List Upload"/> <input type="button" value="..."/> File Browse*: <input type="button" value="Choose file"/> CreditCardCampaignList.xls Upload  Clear 						

Screen: Choose Lead List for Upload

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

Campaign >> List Management >> File Upload

File Upload Upload Error Log

Upload Type*: List Upload

File Browse*: Choose file CreditCardCampaignList.xls

Message

Upload done Successfully

OK

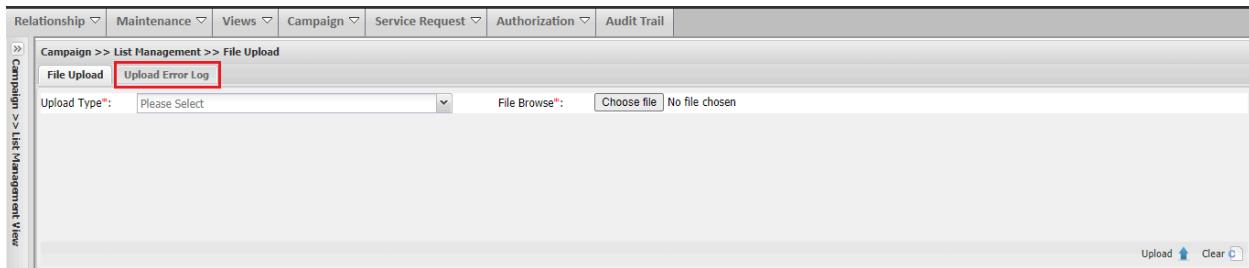
Screen: Lead List –Uploaded

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

4.2.2.2 Review Upload Result - View All Error Log Records

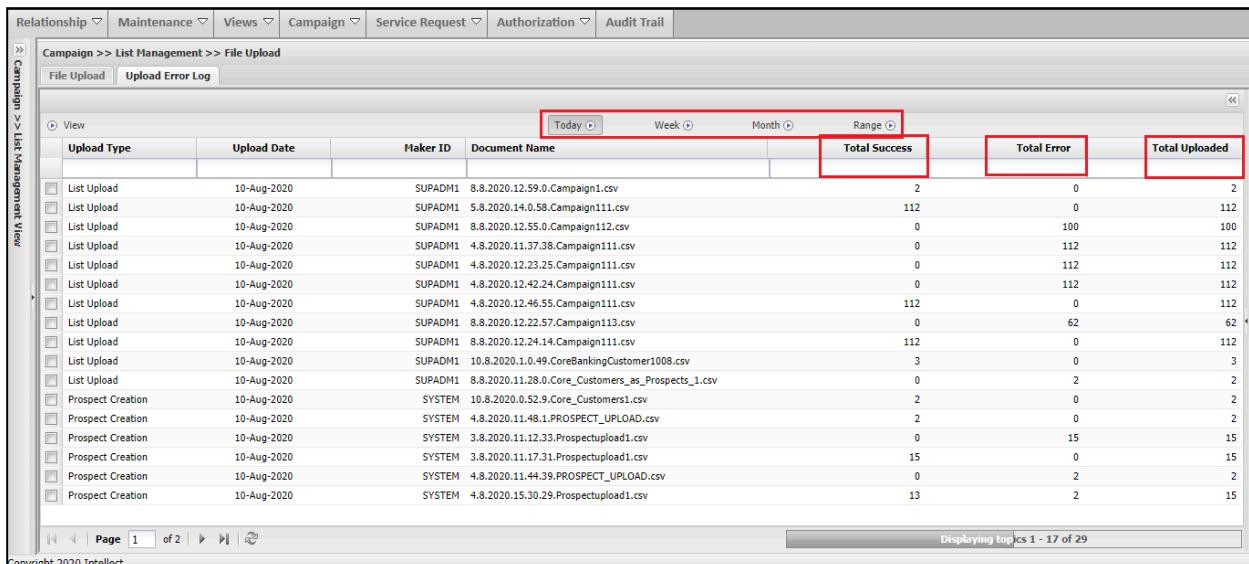
After the upload, the system displays the result of the same in Upload Log

- User clicks on “Upload Error Log” for viewing the result of the upload



Screen: Upload Error Log Navigation

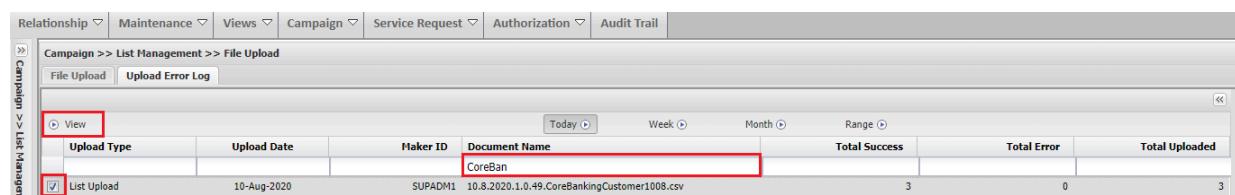
- User views the list of all files uploaded successfully. The user can check the Total Success, Total Error and Total Uploaded records information for the file uploaded. System allows to filter the records based on uploads done today, week, month and date range



Upload Type	Upload Date	Maker ID	Document Name	Total Success	Total Error	Total Uploaded
List Upload	10-Aug-2020	SUPADM1	8.8.2020.12.59.0.Campaign1.csv	2	0	2
List Upload	10-Aug-2020	SUPADM1	8.8.2020.14.0.58.Campaign111.csv	112	0	112
List Upload	10-Aug-2020	SUPADM1	8.8.2020.12.55.0.Campaign112.csv	0	100	100
List Upload	10-Aug-2020	SUPADM1	4.8.2020.11.37.38.Campaign111.csv	0	112	112
List Upload	10-Aug-2020	SUPADM1	4.8.2020.12.23.25.Campaign111.csv	0	112	112
List Upload	10-Aug-2020	SUPADM1	4.8.2020.12.42.24.Campaign111.csv	0	112	112
List Upload	10-Aug-2020	SUPADM1	4.8.2020.12.46.55.Campaign111.csv	112	0	112
List Upload	10-Aug-2020	SUPADM1	8.8.2020.12.22.57.Campaign113.csv	0	62	62
List Upload	10-Aug-2020	SUPADM1	8.8.2020.12.24.14.Campaign111.csv	112	0	112
List Upload	10-Aug-2020	SUPADM1	10.8.2020.1.0.49.CoreBankingCustomer1008.csv	3	0	3
List Upload	10-Aug-2020	SUPADM1	8.8.2020.11.28.0.Core_Customers_as_Prospects_1.csv	0	2	2
Prospect Creation	10-Aug-2020	SYSTEM	10.8.2020.0.52.9.Core_Customers1.csv	2	0	2
Prospect Creation	10-Aug-2020	SYSTEM	4.8.2020.11.48.1.PROSPECT_UPLOAD.csv	2	0	2
Prospect Creation	10-Aug-2020	SYSTEM	3.8.2020.11.12.33.Prospectupload1.csv	0	15	15
Prospect Creation	10-Aug-2020	SYSTEM	3.8.2020.11.17.31.Prospectupload1.csv	15	0	15
Prospect Creation	10-Aug-2020	SYSTEM	4.8.2020.11.44.39.PROSPECT_UPLOAD.csv	0	2	2
Prospect Creation	10-Aug-2020	SYSTEM	4.8.2020.15.30.29.Prospectupload1.csv	13	2	15

Screen: Upload Error Log Summary

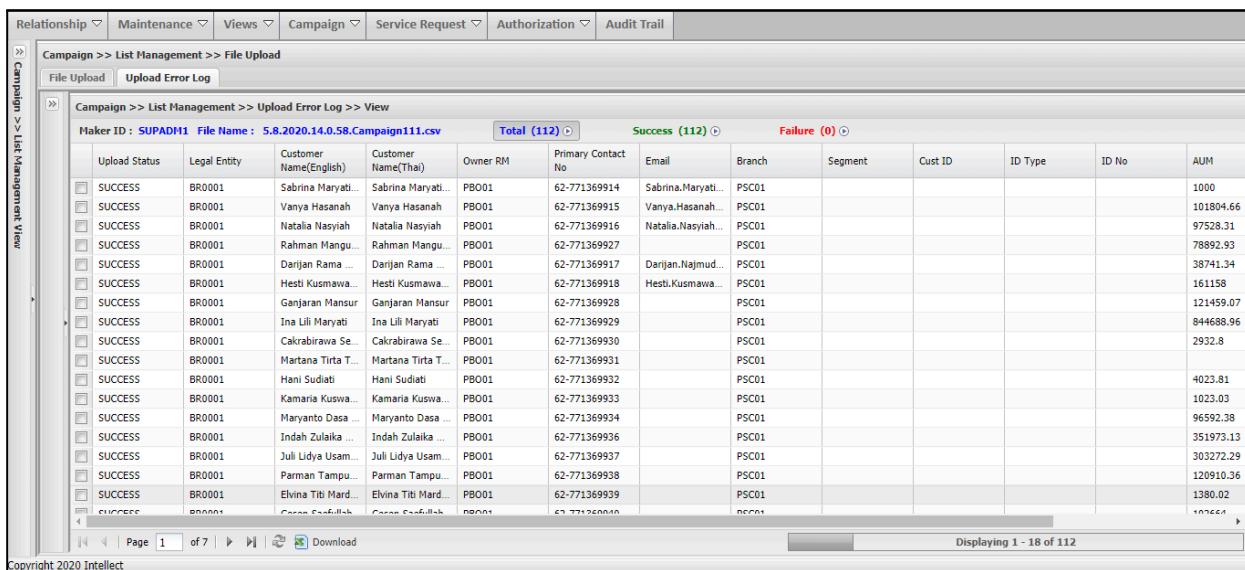
- The user can search the file name, selects the record and clicks on “View” to view the detailed summary of the upload result



Upload Type	Upload Date	Maker ID	Document Name	Total Success	Total Error	Total Uploaded
<input checked="" type="checkbox"/> List Upload	10-Aug-2020	SUPADM1	CoreBan	3	0	3

Screen: Select Error Log Record for View

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



Relationship ▾ Maintenance ▾ Views ▾ Campaign ▾ Service Request ▾ Authorization ▾ Audit Trail

Campaign >> List Management >> File Upload

File Upload Upload Error Log

Campaign >> List Management >> Upload Error Log >> View

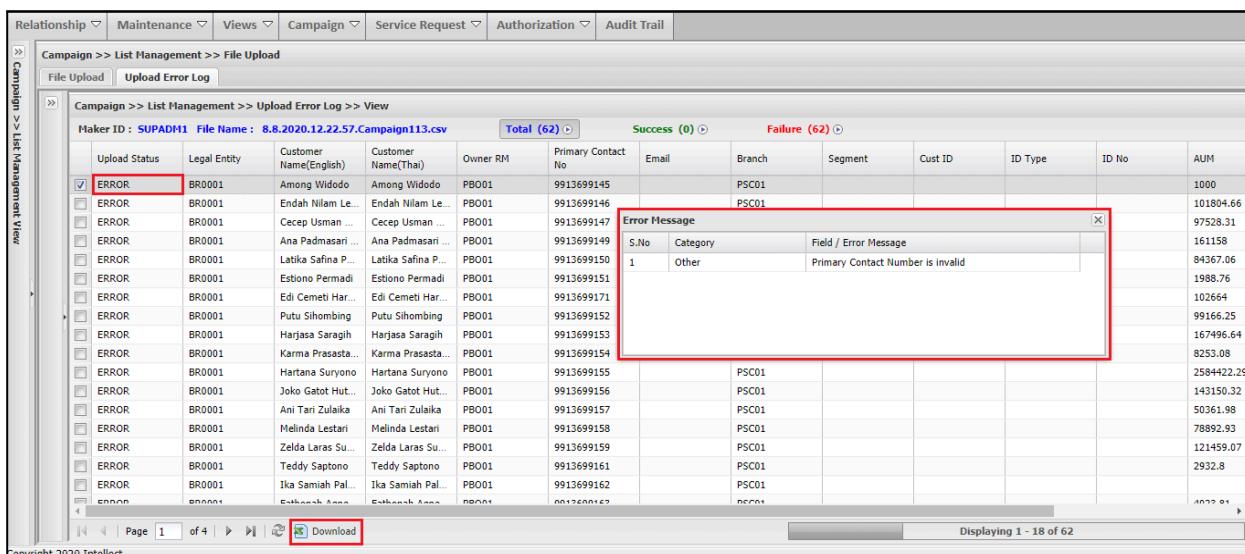
Maker ID : SUPADM1 File Name : 5.8.2020.14.0.58.Campaign111.csv

	Total (112)	Success (112)	Failure (0)									
Upload Status	Legal Entity	Customer Name(English)	Customer Name(Thai)	Owner RM	Primary Contact No	Email	Branch	Segment	Cust ID	ID Type	ID No	AUM
SUCCESS	BR0001	Sabrina Maryati...	Sabrina.Maryati...	PBO01	62-771369914	Sabrina.Maryati...	PSC01					1000
SUCCESS	BR0001	Vanya Hasanah	Vanya Hasanah	PBO01	62-771369915	Vanya.Hasanah...	PSC01					101804.66
SUCCESS	BR0001	Natalia Nasyiah	Natalia.Nasyiah...	PBO01	62-771369916	Natalia.Nasyiah...	PSC01					97528.31
SUCCESS	BR0001	Rahman Mangu...	Rahman.Mangu...	PBO01	62-771369927	Rahman.Mangu...	PSC01					78892.93
SUCCESS	BR0001	Darjan Rama ...	Darjan.Rama...	PBO01	62-771369917	Darjan.Najmud...	PSC01					38741.34
SUCCESS	BR0001	Hesti Kusmawa...	Hesti.Kusmawa...	PBO01	62-771369918	Hesti.Kusmawa...	PSC01					161158
SUCCESS	BR0001	Ganjaran Mansur	Ganjaran.Mansur...	PBO01	62-771369928	Ganjaran.Mansur...	PSC01					121459.07
SUCCESS	BR0001	Ina Lili Maryati	Ina.Lili.Maryati...	PBO01	62-771369929	Ina.Lili.Maryati...	PSC01					844688.96
SUCCESS	BR0001	Cakrabirawa Se...	Cakrabirawa.Se...	PBO01	62-771369930	Cakrabirawa.Se...	PSC01					2932.8
SUCCESS	BR0001	Martana Tirta T...	Martana.Tirta...	PBO01	62-771369931	Martana.Tirta...	PSC01					4023.81
SUCCESS	BR0001	Hani Sudiat	Hani.Sudiat...	PBO01	62-771369932	Hani.Sudiat...	PSC01					1023.03
SUCCESS	BR0001	Kamarina Kuswawa...	Kamarina.Kuswawa...	PBO01	62-771369933	Kamarina.Kuswawa...	PSC01					96592.38
SUCCESS	BR0001	Maryanto Dasa ...	Maryanto.Dasa...	PBO01	62-771369934	Maryanto.Dasa...	PSC01					35197.13
SUCCESS	BR0001	Indah Zulaika ...	Indah.Zulai... Latika Safina P...	PBO01	62-771369936	Indah.Zulai... Latika.Safina...	PSC01					303272.29
SUCCESS	BR0001	Juli Lidya Usam...	Juli.Lidya.Usam...	PBO01	62-771369937	Juli.Lidya.Usam...	PSC01					120910.36
SUCCESS	BR0001	Parman Tampu...	Parman.Tampu...	PBO01	62-771369938	Parman.Tampu...	PSC01					1380.02
SUCCESS	BR0001	Elvina Titi Mard...	Elvina.Titi.Mard...	PBO01	62-771369939	Elvina.Titi.Mard...	PSC01					107661
Success	BR0001	Caron Cawillah	Caron.Cawillah...	PBO01	62-771369940	Caron.Cawillah...	PSC01					

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Screen: View Error Log Detailed Summary

5. The user 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 “Download” button



Relationship ▾ Maintenance ▾ Views ▾ Campaign ▾ Service Request ▾ Authorization ▾ Audit Trail

Campaign >> List Management >> File Upload

File Upload Upload Error Log

Campaign >> List Management >> Upload Error Log >> View

Maker ID : SUPADM1 File Name : 8.8.2020.12.22.57.Campaign113.csv

	Total (62)	Success (0)	Failure (62)									
Upload Status	Legal Entity	Customer Name(English)	Customer Name(Thai)	Owner RM	Primary Contact No	Email	Branch	Segment	Cust ID	ID Type	ID No	AUM
ERROR	BR0001	Among Widodo	Among.Widodo...	PBO01	9913699145		PSC01					1000
ERROR	BR0001	Endah Nilam Le...	Endah.Nilam...	PBO01	9913699146		PSC01					101804.66
ERROR	BR0001	Cecep Usman ...	Cecep.Usman...	PBO01	9913699147		PSC01					97528.31
ERROR	BR0001	Ana Padmasari ...	Ana.Padmasari...	PBO01	9913699149		PSC01					161158
ERROR	BR0001	Latika Safina P...	Latika.Safina...	PBO01	9913699150		PSC01					84367.06
ERROR	BR0001	Estiono Permadji	Estiono.Permadi...	PBO01	9913699151		PSC01					1988.76
ERROR	BR0001	Edi Cemeti Har...	Edi.Cemeti.Har...	PBO01	9913699171		PSC01					102664
ERROR	BR0001	Putu Sihamong...	Putu.Sihamong...	PBO01	9913699152		PSC01					99166.25
ERROR	BR0001	Harjasa Saragih	Harjasa.Saragih...	PBO01	9913699153		PSC01					167496.64
ERROR	BR0001	Karma Prasasta...	Karma.Prasasta...	PBO01	9913699154		PSC01					8253.08
ERROR	BR0001	Hartana Suryono	Hartana.Suryono...	PBO01	9913699155		PSC01					2584422.29
ERROR	BR0001	Joko Gatot Hut...	Joko.Gatot.Hut...	PBO01	9913699156		PSC01					143150.32
ERROR	BR0001	Ani Tari Zulaika	Ani.Tari.Zulai...	PBO01	9913699157		PSC01					50361.98
ERROR	BR0001	Melinda Lestari	Melinda.Lestari...	PBO01	9913699158		PSC01					78892.93
ERROR	BR0001	Zelda Laras Su...	Zelda.Laras.Su...	PBO01	9913699159		PSC01					121459.07
ERROR	BR0001	Teddy Saptono	Teddy.Saptono...	PBO01	9913699161		PSC01					2932.8
ERROR	BR0001	Ika Samiah Pal...	Ika.Samiah.Pal...	PBO01	9913699162		PSC01					

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Screen: View Error Record with Error Details

6. 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 details in the Journey of Lead to Prospect and Prospect to Customer document

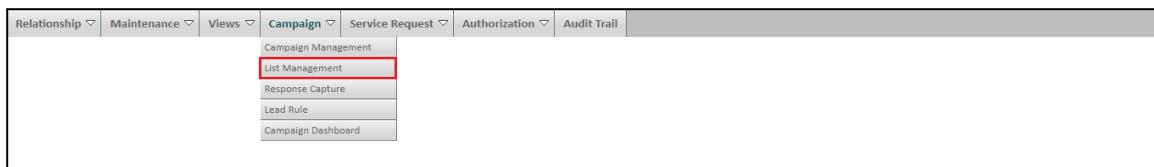
4.2.4 List Management

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

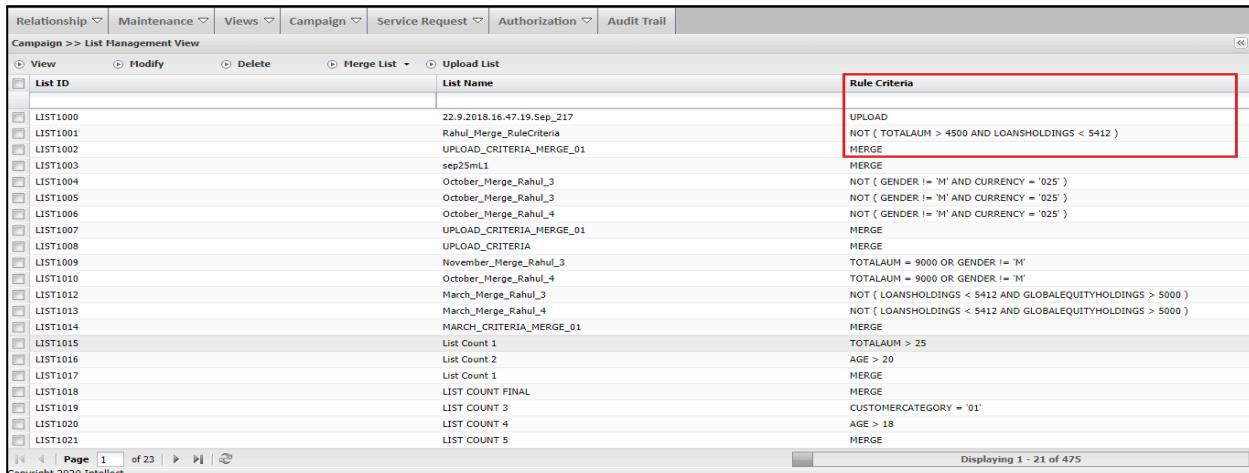
NOTE: The lead lists present in the List Management screen will be available for attaching to a Campaign during the Campaign Definition process

1. User hovers on the “Campaign” menu and selects the “List Management” sub menu



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



Screen: List Management Screen

4.2.4.1 View Lead List

1. User selects the Lead List and clicks on the “View” button to view the list

Campaign >> List Management View		
<input type="radio"/> View	<input type="radio"/> Modify	<input type="radio"/> Delete
<input type="checkbox"/> List ID	List Name	Rule Criteria
<input checked="" type="checkbox"/> LIST1000	22.9.2018.16.47.19.Sep_217	UPLOAD
<input type="checkbox"/> LIST1001	Rahul_Merge_RuleCriteria	NOT (TOTALAUM > 4500 AND LOANSHOLDINGS < 5412)
<input type="checkbox"/> LIST1002	UPLOAD_CRITERIA_MERGE_01	MERGE
<input type="checkbox"/> LIST1003	sep25ml1	MERGE
<input type="checkbox"/> LIST1004	October_Merge_Rahul_3	NOT (GENDER != 'M' AND CURRENCY = '025')
<input type="checkbox"/> LIST1005	October_Merge_Rahul_3	NOT (GENDER != 'M' AND CURRENCY = '025')
<input type="checkbox"/> LIST1006	October_Merge_Rahul_4	NOT (GENDER != 'M' AND CURRENCY = '025')
<input type="checkbox"/> LIST1007	UPLOAD_CRITERIA_MERGE_01	MERGE
<input type="checkbox"/> LIST1008	UPLOAD_CRITERIA	MERGE
<input type="checkbox"/> LIST1009	November_Merge_Rahul_3	TOTALAUM = 9000 OR GENDER != 'M'
<input type="checkbox"/> LIST1010	October_Merge_Rahul_4	TOTALAUM = 9000 OR GENDER != 'M'
<input type="checkbox"/> LIST1012	March_Merge_Rahul_3	NOT (LOANSHOLDINGS < 5412 AND GLOBALEQUITYHOLDINGS > 5000)
<input type="checkbox"/> LIST1013	March_Merge_Rahul_4	NOT (LOANSHOLDINGS < 5412 AND GLOBALEQUITYHOLDINGS > 5000)
<input type="checkbox"/> LIST1014	MARCH_CRITERIA_MERGE_01	MERGE
<input type="checkbox"/> LIST1015	List Count 1	TOTALAUM > 25
<input type="checkbox"/> LIST1016	List Count 2	AGE > 20
<input type="checkbox"/> LIST1017	List Count 1	MERGE
<input type="checkbox"/> LIST1018	LIST COUNT FINAL	MERGE
<input type="checkbox"/> LIST1019	LIST COUNT 3	CUSTOMERCATEGORY = '01'
<input type="checkbox"/> LIST1020	LIST COUNT 4	AGE > 18
<input type="checkbox"/> LIST1021	LIST COUNT 5	MERGE

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Displaying 1 - 21 of 476

Screen: View the Lead List

- User views the Lead List Information and clicks on the “Double Arrow” button to navigate back to the list management

Campaign >> List Management >> View					
CIF	Customer Name/Entity Name	Relationship Manager Name & ID	Branch	Region	
2019090842057886	Danish Digorta	SBIRM1-Rohit	00516-GHATKOPAR (EAST) MUMBAI	MAHARASHTRA	
2019090842057887	Cheetan bhaagt	SBIRM1-Rohit	00516-GHATKOPAR (EAST) MUMBAI	MAHARASHTRA	
2019090842057891	Srijan	SBIRM1-Rohit	00516-GHATKOPAR (EAST) MUMBAI	MAHARASHTRA	

Page 1 of 1 |  | 

Export to Excel

Displaying 1 - 3 of 3

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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

Campaign >> List Management View		
<input type="radio"/> View	<input checked="" type="radio"/> Modify	<input type="radio"/> Delete
List ID	List Name	Rule Criteria
LIST1000	22.9.2018.16.47.19.Sep_217	UPLOAD
LIST1001	Rahul_Merge_RuleCriteria	NOT (TOTALAUM > 4500 AND LOANSHOLDINGS < 5412)
LIST1002	UPLOAD_CRITERIA_MERGE_01	ERGE
LIST1003	sep25ml1	ERGE
LIST1004	October_Merge_Rahul_3	OT (GENDER != 'M' AND CURRENCY = '025')
LIST1005	October_Merge_Rahul_3	OT (GENDER != 'M' AND CURRENCY = '025')
LIST1006	October_Merge_Rahul_4	OT (GENDER != 'M' AND CURRENCY = '025')
LIST1007	UPLOAD_CRITERIA_MERGE_01	ERGE
LIST1008	UPLOAD_CRITERIA	ERGE
LIST1009	November_Merge_Rahul_3	TOTALAUM = 9000 OR GENDER != 'M'
LIST1010	October_Merge_Rahul_4	TOTALAUM = 9000 OR GENDER != 'M'
LIST1012	March_Merge_Rahul_3	OT (LOANSHOLDINGS < 5412 AND GLOBALEQUITYHOLDINGS > 5000)
LIST1013	March_Merge_Rahul_4	OT (LOANSHOLDINGS < 5412 AND GLOBALEQUITYHOLDINGS > 5000)
LIST1014	MARCH_CRITERIA_MERGE_01	ERGE
LIST1015	List Count 1	TOTALAUM > 25
LIST1016	List Count 2	AGE > 20
LIST1017	List Count 1	ERGE
LIST1018	LIST COUNT FINAL	ERGE
LIST1019	LIST COUNT 3	CUSTOMERCATEGORY = '01'
LIST1020	LIST COUNT 4	AGE > 18
LIST1021	LIST COUNT 5	ERGE

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

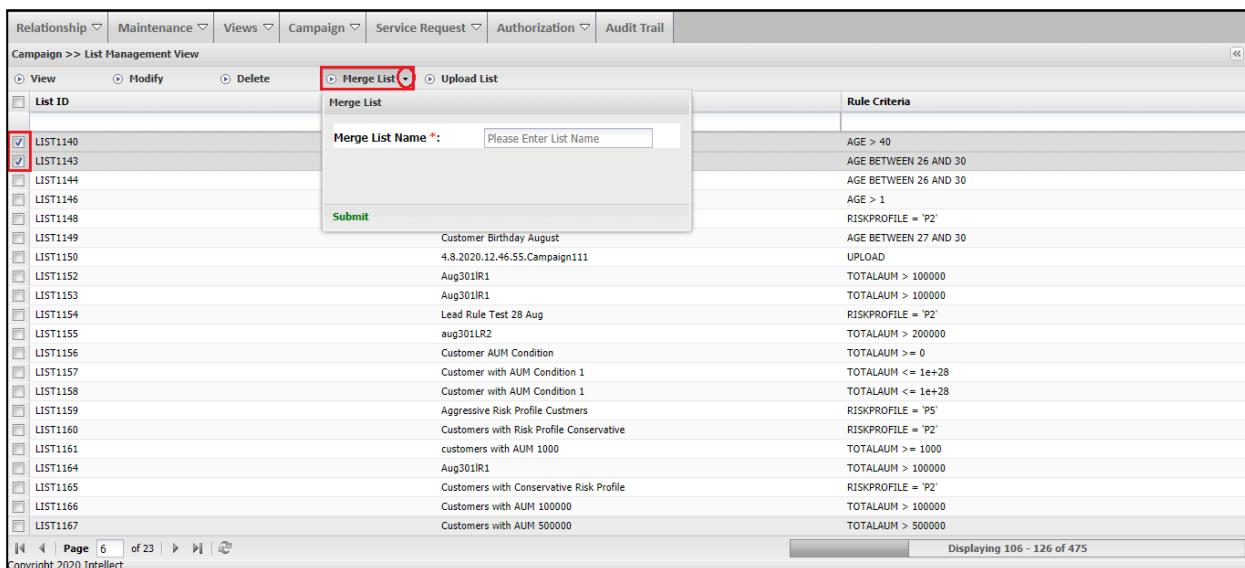
Campaign >> List Management >> Modify					
CIF	Customer Name/Entity Name	Relationship Manager Name & ID	Branch	Region	
00049635	CHAYAPHA TEERAPHONG	SUPADM2-superadmintwo	225-KC Sunguminasa	NEW DELHI	
00049636	YANISA KLUKLIN	SUPADM2-superadmintwo	225-KC Sunguminasa	NEW DELHI	
00049637	WUTTHIPHONG CHANGNOI	SUPADM2-superadmintwo	225-KC Sunguminasa	NEW DELHI	
00049638	PIMCHANOK ROOSAMAI	SUPADM2-superadmintwo	225-KC Sunguminasa	NEW DELHI	
00049639	ARTHIT PHAKDEEKHIEAW	SUPADM2-superadmintwo	225-KC Sunguminasa	NEW DELHI	
00049640	TEWA KUMPUME	SUPADM2-superadmintwo	225-KC Sunguminasa	NEW DELHI	
00049641	PRAKAYDOW JEARASAKUNPON	SUPADM2-superadmintwo	225-KC Sunguminasa	NEW DELHI	
00049642	KITCHA WICHITPHONGSA	SUPADM2-superadmintwo	225-KC Sunguminasa	NEW DELHI	
00049643	PONMATIN PACHARAPHOJAREN	SUPADM2-superadmintwo	225-KC Sunguminasa	NEW DELHI	
00049644	NATTHAWUT PRINYA	SUPADM2-superadmintwo	225-KC Sunguminasa	NEW DELHI	
00049645	WIRAWAN NUNTA	SUPADM2-superadmintwo	225-KC Sunguminasa	NEW DELHI	
00049646	KANDA KAEMPDINTT	SUPADM2-superadmintwo	225-KC Sunguminasa	NEW DELHI	
00049647	KRISANA M	SUPADM2-superadmintwo	225-KC Sunguminasa	NEW DELHI	
00049648	SUCHAWAD	SUPADM2-superadmintwo	225-KC Sunguminasa	NEW DELHI	
00049649	VIVIS KUMF	SUPADM2-superadmintwo	225-KC Sunguminasa	NEW DELHI	
00049650	NITAYA SRI	SUPADM2-superadmintwo	225-KC Sunguminasa	NEW DELHI	
00049651	KANTONG S	SUPADM2-superadmintwo	225-KC Sunguminasa	NEW DELHI	
00049652	CHINABOOI	SUPADM2-superadmintwo	225-KC Sunguminasa	NEW DELHI	
00049653	TAYAKORN	SUPADM2-superadmintwo	225-KC Sunguminasa	NEW DELHI	
00049654	SUPANEE IR	SUPADM2-superadmintwo	225-KC Sunguminasa	NEW DELHI	

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

- User selects the lists by clicking on the checkbox available against each record and clicks on the “Merge List” arrow symbol



Campaign >> List Management View

Merge List

Merge List Name *	Please Enter List Name
Submit	

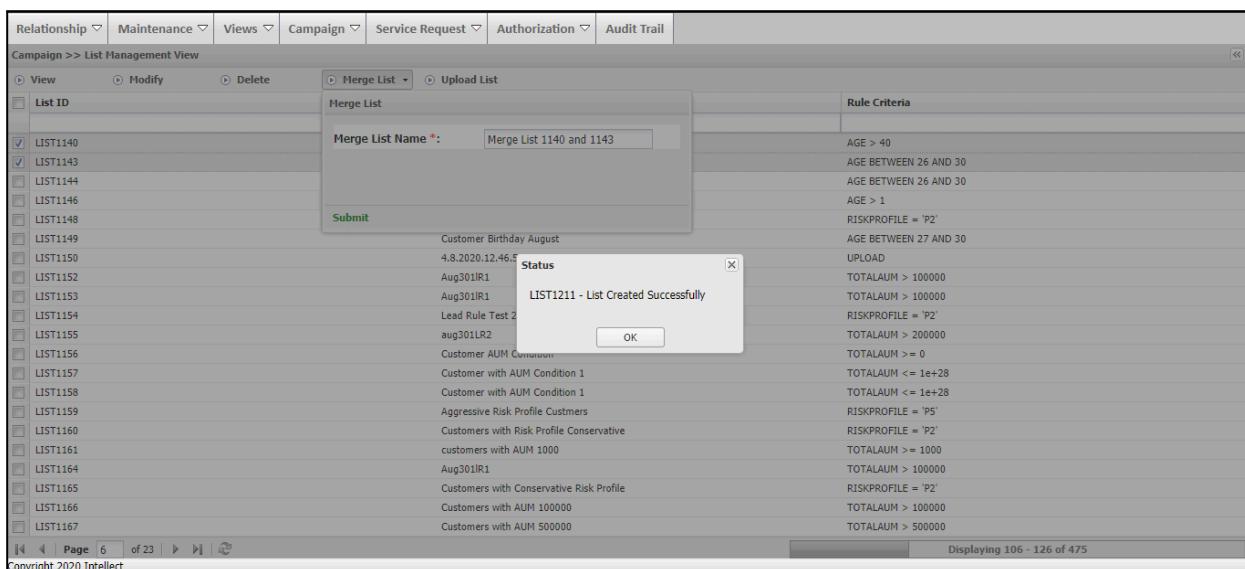
Rule Criteria
AGE > 40
AGE BETWEEN 26 AND 30
AGE BETWEEN 26 AND 30
AGE > 1
RISKPROFILE = 'P2'
AGE BETWEEN 27 AND 30
UPLOAD
TOTALAUM > 100000
TOTALAUM > 100000
RISKPROFILE = 'P2'
TOTALAUM > 200000
TOTALAUM >= 0
TOTALAUM <= 1e+28
TOTALAUM <= 1e+28
RISKPROFILE = 'P5'
RISKPROFILE = 'P2'
TOTALAUM >= 1000
TOTALAUM > 100000
RISKPROFILE = 'P2'
TOTALAUM > 100000
TOTALAUM > 500000

Customer Birthday August
4.8.2020.12.46.55.Campaign111
Aug301R1
Aug301R1
Lead Rule Test 28 Aug
aug301LR2
Customer AUM Condition
Customer with AUM Condition 1
Customer with AUM Condition 1
Aggressive Risk Profile Customers
Customers with Risk Profile Conservative
customers with AUM 1000
Aug301R1
Customers with Conservative Risk Profile
Customers with AUM 100000
Customers with AUM 500000

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Screen: Merge Lead Lists

- User inputs the list name for the merged list and clicks on “Submit” and a new list is created



Campaign >> List Management View

Merge List

Merge List Name *	Merge List 1140 and 1143
Submit	

Status
LIST1211 - List Created Successfully

OK

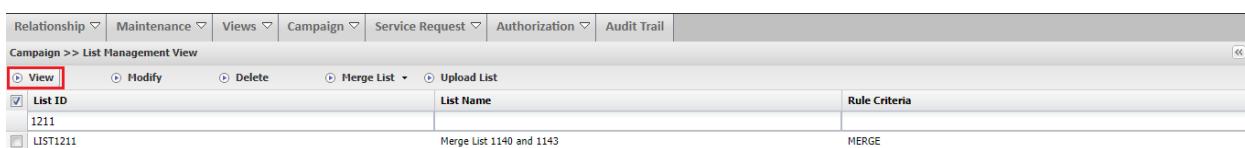
Rule Criteria
AGE > 40
AGE BETWEEN 26 AND 30
AGE BETWEEN 26 AND 30
AGE > 1
RISKPROFILE = 'P2'
AGE BETWEEN 27 AND 30
UPLOAD
TOTALAUM > 100000
TOTALAUM > 100000
RISKPROFILE = 'P2'
TOTALAUM > 200000
TOTALAUM >= 0
TOTALAUM <= 1e+28
TOTALAUM <= 1e+28
RISKPROFILE = 'P5'
RISKPROFILE = 'P2'
TOTALAUM >= 1000
TOTALAUM > 100000
RISKPROFILE = 'P2'
TOTALAUM > 100000
TOTALAUM > 500000

Customer Birthday August
4.8.2020.12.46.5
Aug301R1
Aug301R1
Lead Rule Test 2
aug301LR2
Customer AUM Condition
Customer with AUM Condition 1
Customer with AUM Condition 1
Aggressive Risk Profile Customers
Customers with Risk Profile Conservative
customers with AUM 1000
Aug301R1
Customers with Conservative Risk Profile
Customers with AUM 100000
Customers with AUM 500000

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Screen: Creating Merged Lead List

- User selects the merged lead list record and clicks on the “View” button to view the leads



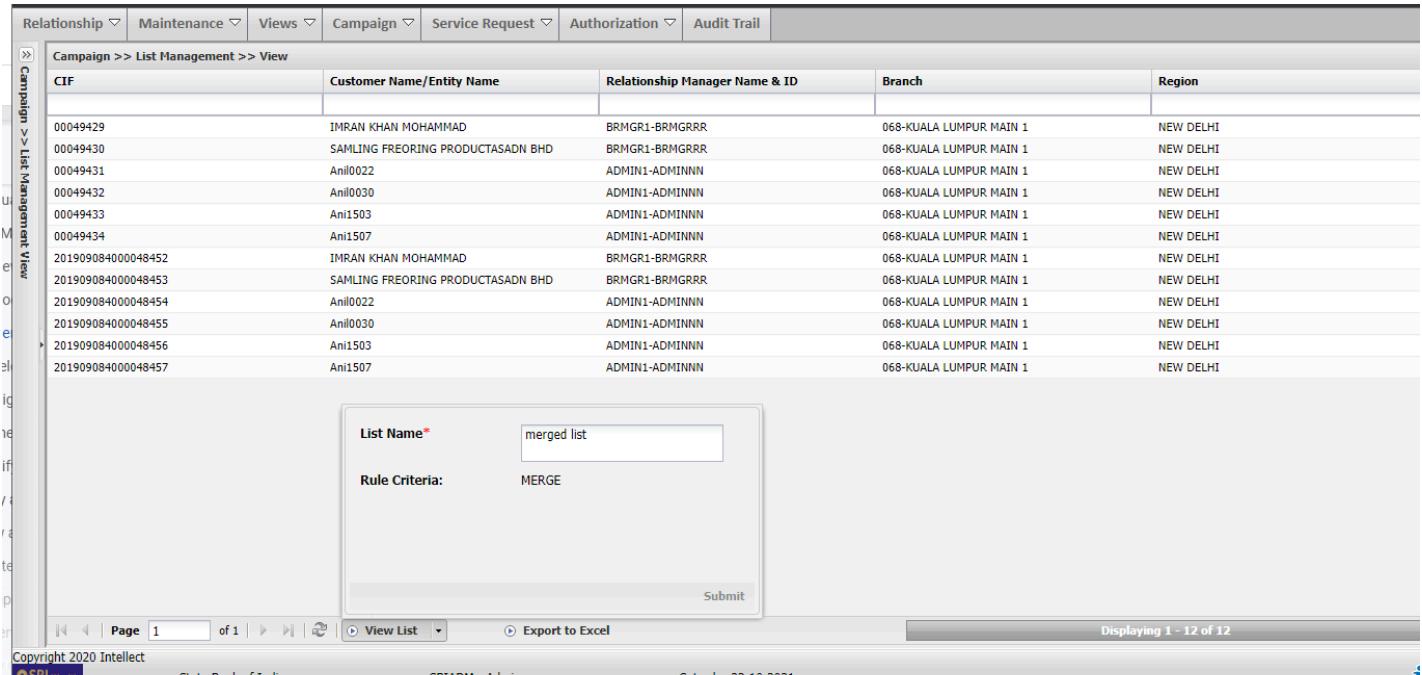
Campaign >> List Management View

View

List ID	List Name	Rule Criteria
1211	Merge List 1140 and 1143	MERGE
LIST1211		

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 record level on the following parameters:
 - a. Customer Name(English) + Primary Contact No
 - b. Customer Name(English) + Email
 - c. Customer Name(Local Language) + Primary Contact No
 - d. Customer Name(Local Language) + Email

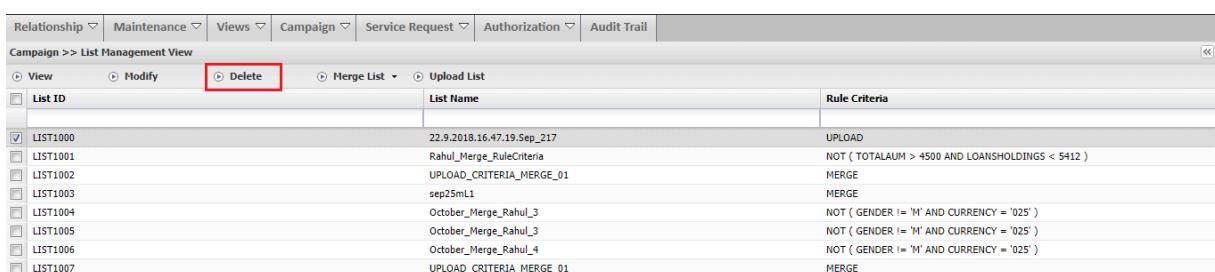


The screenshot shows a list management interface for campaigns. At the top, there's a navigation bar with tabs like Relationship, Maintenance, Views, Campaign, Service Request, Authorization, and Audit Trail. Below the navigation is a sub-header 'Campaign >> List Management >> View'. The main area displays a table with columns: CIF, Customer Name/Entity Name, Relationship Manager Name & ID, Branch, and Region. There are 12 rows of data. Overlaid on the bottom left is a modal dialog box with fields for 'List Name*' (containing 'merged list') and 'Rule Criteria' (containing 'MERGE'). At the bottom of the page, there are buttons for 'Page' (set to 1), 'View List', 'Export to Excel', and a message 'Displaying 1 - 12 of 12'.

Screen: View Merged Lead List

4.2.4.4 Delete Lead List

1. User selects the Lead List and clicks on the “Delete” button to delete the list



This screenshot shows a list management interface for campaigns. The top navigation bar includes Relationship, Maintenance, Views, Campaign, Service Request, Authorization, and Audit Trail. The sub-header 'Campaign >> List Management View' is visible. The main area has a toolbar with buttons for View, Modify, Delete (which is highlighted with a red box), Merge List, and Upload List. Below the toolbar is a table with columns: List ID, List Name, and Rule Criteria. The table lists several entries, each with a checkbox next to it. The 'Delete' button in the toolbar is highlighted with a red box.

Screen: Delete Lead List

2. User clicks on the “Delete List” and “Submit” to delete the list

Relationship	Maintenance	Views	Campaign	Service Request	Authorization	Audit Trail	
Campaign >> List Management >> Delete							
CIF	Customer Name/Entity Name		Relationship Manager Name & ID		Branch	Region	
00049226	SAIMNGAK SAEHANG	SUPADM2-superadmintwo	225-KC Sunguminasa	NEW DELHI			
00049227	SIPHAI CHANGNOI	SUPADM2-superadmintwo	225-KC Sunguminasa	NEW DELHI			
00049228	PHANUWAT PHOOPRASERT	SUPADM2-superadmintwo	225-KC Sunguminasa	NEW DELHI			
00049229	KEANGKAI SIRIJAREA	SUPADM2-superadmintwo	225-KC Sunguminasa	NEW DELHI			
00049230	SIRIBAT NORMANEPAISAN	SUPADM2-superadmintwo	225-KC Sunguminasa	NEW DELHI			
00049231	SALEE PRASANAOMBUT	SUPADM2-superadmintwo	225-KC Sunguminasa	NEW DELHI			
00049232	SUPHATTHA WORADJARIY	SUPADM2-superadmintwo	225-KC Sunguminasa	NEW DELHI			
00049233	AREE THAMWIBOONCHAI	SUPADM2-superadmintwo	225-KC Sunguminasa	NEW DELHI			
00049234	LJFFFF	S Status	225-KC Sunguminasa	NEW DELHI			
00049235	KANYANAT ISSARANON	S Status	225-KC Sunguminasa	NEW DELHI			
00049236	NAMOOY KHAMSUWAN	S Status	225-KC Sunguminasa	NEW DELHI			
00049237	KITCHAVATH BOONSETH	S Status	225-KC Sunguminasa	NEW DELHI			
00049238	PIGOOITHIP RIAMPRASET	S Status	225-KC Sunguminasa	NEW DELHI			
00049239	JU	OK	225-KC Sunguminasa	NEW DELHI			
00049241	P1	List Name*	30.1.2020.10.6.40.RHB_LIST_7	225-KC Sunguminasa	NEW DELHI		
00049242	SU	Rule Criteria:	UPLOAD	225-KC Sunguminasa	NEW DELHI		
00049243	TH			225-KC Sunguminasa	NEW DELHI		
00049244	CH			225-KC Sunguminasa	NEW DELHI		
00049245	PA			225-KC Sunguminasa	NEW DELHI		
00049246	SU			225-KC Sunguminasa	NEW DELHI		
00049247	SU			225-KC Sunguminasa	NEW DELHI		
00049248	RA			225-KC Sunguminasa	NEW DELHI		
00049249	TH	Delete		225-KC Sunguminasa	NEW DELHI		
Page 1 of 9		Delete List	Export to Excel	Displaying 1 - 23 of 198			

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SBI Website

CDTADM Admin

Saturday 22.10.2021

Screen: Delete Lead List

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 Customer Profile Desk, hovers over “Campaign” and selects “Campaign Management” from the dropdown to navigate to the Campaign Management screen



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

Screenshot of the Campaign Management screen showing a list of existing campaigns and a "New" button highlighted.

Campaign/Event Name	Campaign Type	Campaign/Event Status	Target Response (in %)	Status	Creation Date
Campaign by N	Event	Active	100		2021-12-31 15:49:12.0
SBI CAMPAIGN DEMO	Event	Active	100		2021-11-09 11:47:24.0
PARAG NAWANI	Event	Active	100		2021-11-09 11:45:16.0
CT	Event	Rejected	100		2021-09-13 11:24:48.0
Credit Card for young professional	Event	Active	80		2021-09-09 18:11:42.0
Debit Card for young professional	Event	Active	80		2021-09-09 18:03:43.0
Sep Camp3	Event	Active	100		2021-09-09 14:45:41.0
Sep Camp 1	Event	Active	100		2021-09-09 14:25:28.0
SBI_Wealth 2	Event	New	100		2021-09-08 18:07:48.0
SBI_Wealth1	Event	Active	100		2021-09-08 17:45:34.0
XYZ CAM	Event	Active	100		2021-09-08 14:50:38.0
SBI CAMP	Event	Active	100		2021-09-08 14:24:14.0
SBI_New	Event	New	100		2021-09-08 14:03:13.0
Sep Camp 2	Event	New	100		2021-09-08 12:53:27.0
Exclusive Benefit for BRI Private Debit C...	Event	New	100		2021-08-25 14:15:11.0
AUG CAMP 1	Event	Active	100		2021-08-18 19:02:45.0
BRI CAMP1	Event	Active	100		2021-08-13 10:32:46.0
BRI CAP1	Event	New	100		2021-08-12 18:25:12.0
ADMIN1	Event	Active	100		2020-02-21 12:11:01.0
RUSH HOUR	Event	New	100		2020-02-21 11:41:48.0
Feb211camp	Event	Active	100		2020-02-21 11:07:08.0

Page 1 of 2 | Displaying 1 - 21 of 33

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Screen: Define a New Campaign

- On the New Campaign screen, the User can navigate through the following tabs to capture campaign details:
 - General** - Capture General information such as Campaign Name, Channel etc.

Relationship ▾ Maintenance ▾ Views ▾ Campaign ▾ Service Request ▾ Authorization ▾ Audit Trail

Campaign >> Campaign Management >> New

General

Campaign/Event Name*:	Campaign Name (Local Language):
Campaign Type*:	Campaign Channel*:
Campaign/Event ID*:	Campaign/Event Status:
Target Response (in %)*:	Product Type:
Sub Product:	Product Name:
Product Availability:	Reward For Customer:
Reward For RM:	Mode of Communication*:
Campaign Performance (in %)*:	

KB

Objective*:

Schedule

Start Date*: 20-Jan-2022 End Date*: 20-Jan-2022

Broadcast Date & Time: Campaign Period (Days)*:

Remarks:

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Screen: Capture General Information

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

Relationship ▾ Maintenance ▾ Views ▾ Campaign ▾ Service Request ▾ Authorization ▾ Audit Trail

Campaign >> Campaign Management >> New

Financials

Add Cost Type Budget Actual Cost Currency

Please Select INR-Indian Rupee

<input checked="" type="checkbox"/> Cost Type	Budget	Actual Cost	Currency
<input checked="" type="checkbox"/> Please Select	<input type="button" value="..."/>	<input type="button" value="..."/>	INR-Indian Rupee
Advertisement Cost			
Campaign Cost			

Preview Save as draft Save Close

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Screen: Capture Financial Information

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



Relationship ▾ Maintenance ▾ Views ▾ Campaign ▾ Service Request ▾ Authorization ▾ Audit Trail

Campaign >> Campaign Management >> New

General Financials Admin Campaign Notes Brochure(s)

Owner Details

Campaign Manager Name * PBO
Campaign Manager Email:

List Management

(Add Delete) List Name Rule Criteria View
 List Name Please Select

Preview Save as draft Save Close

Screen: Capture Admin details

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

Relationship ▾ Maintenance ▾ Views ▾ Campaign ▾ Service Request ▾ Authorization ▾ Audit Trail

Campaign >> Campaign Management >> New

General Financials Admin Campaign Notes Brochure(s)

Email*
Subject*:

Tahoma B I U A A

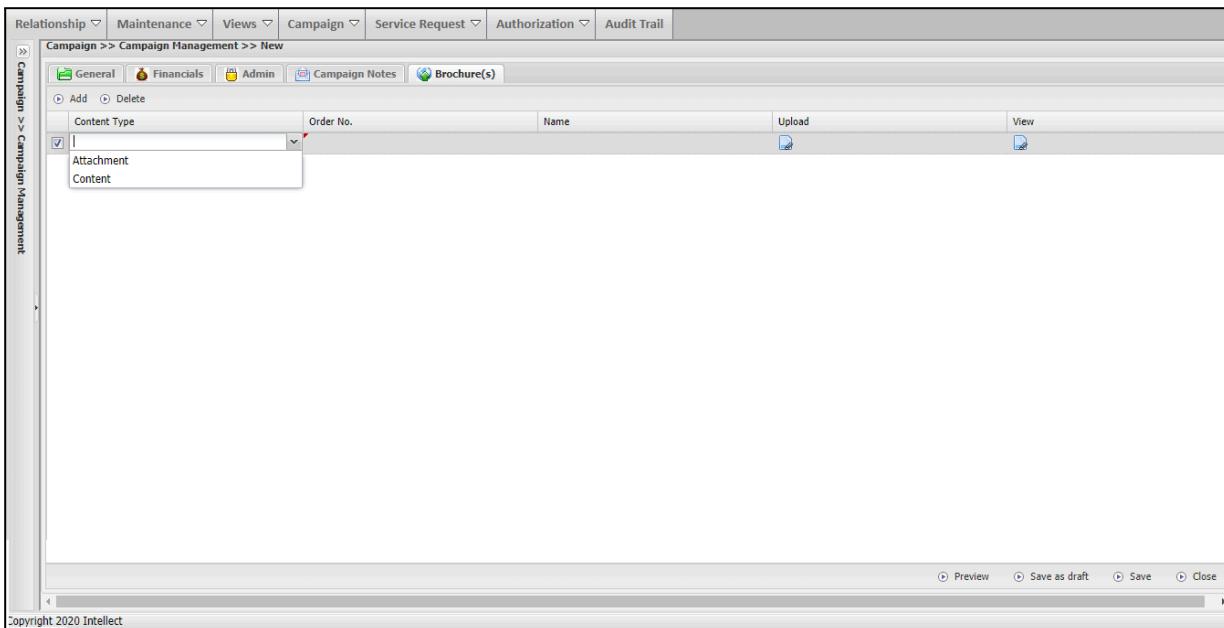
Signature*:

SHS*

Preview Save as draft Save Close

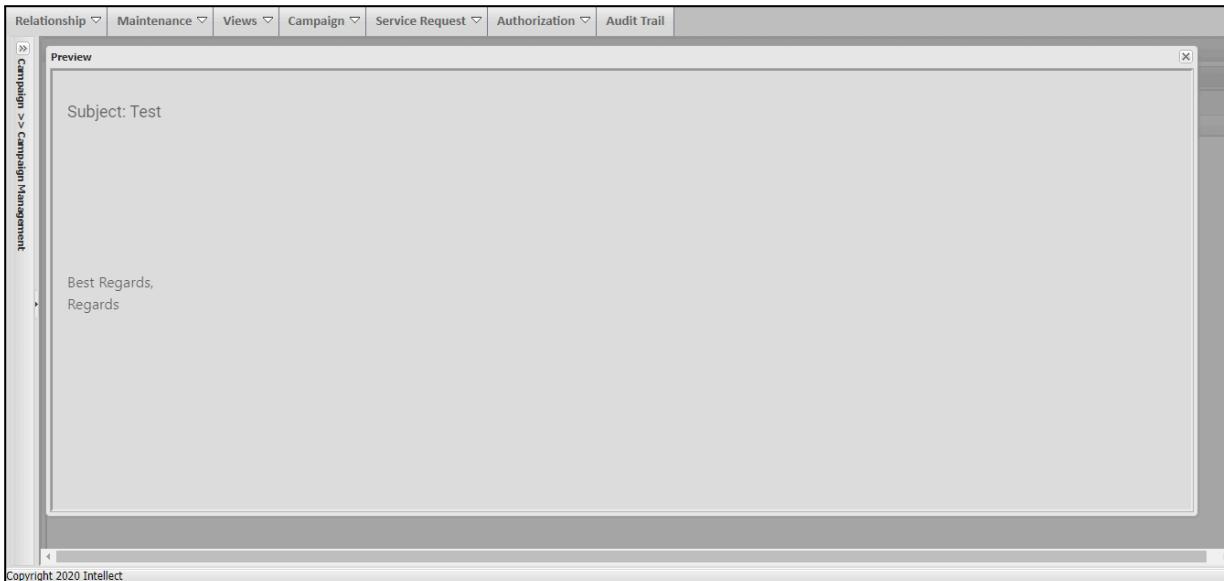
Screen: Capture Campaign Notes

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



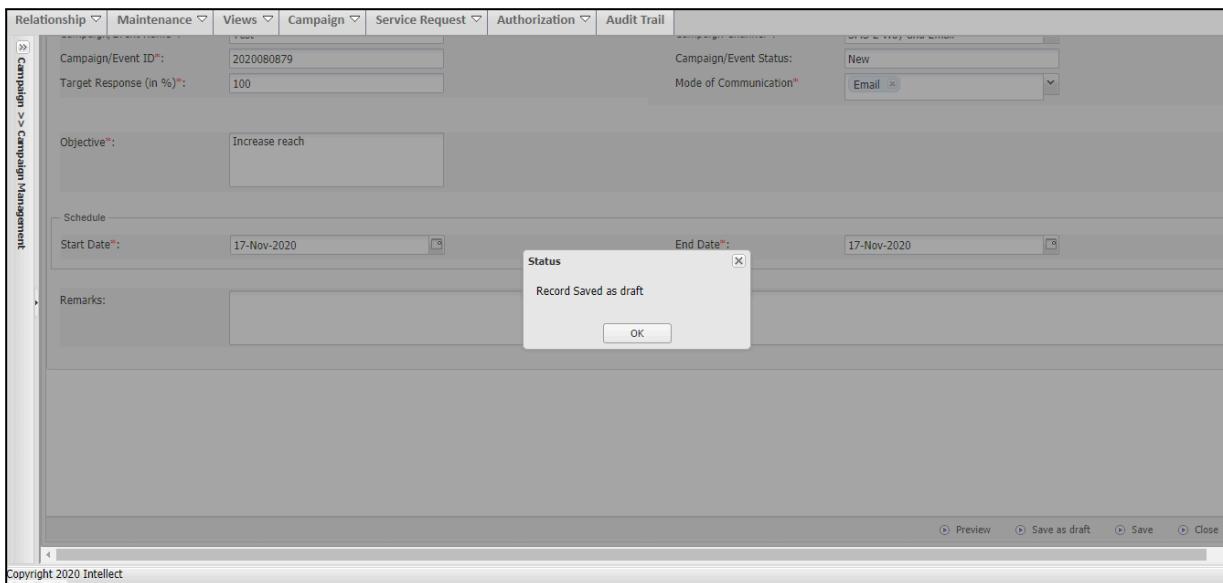
Screen: Attach Brochures

3. After the User has captured 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. 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 on the campaign start date



Screen: Preview Email

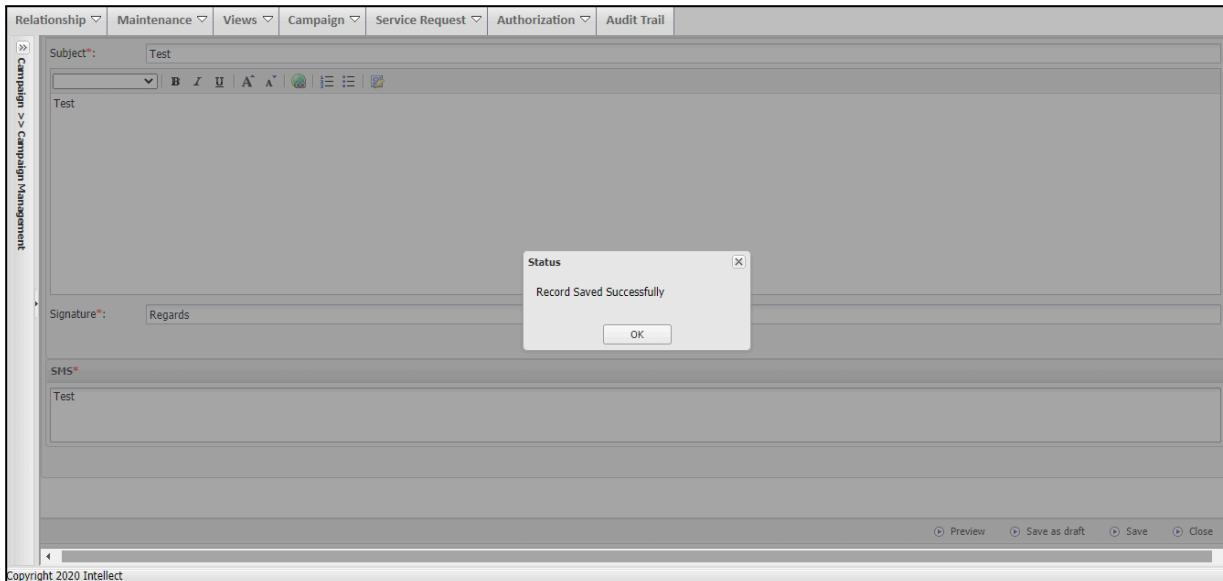
- b. **Save as Draft** - Click on the “Save as Draft” button to save the campaign in draft mode. The draft can be viewed/modified from the Campaign Management screen



The screenshot shows a software interface for campaign management. At the top, there is a navigation bar with tabs: Relationship, Maintenance, Views, Campaign, Service Request, Authorization, and Audit Trail. Below the navigation bar, there are several input fields and dropdown menus. One dropdown menu is open, showing "New" as the selected option. A modal dialog box is displayed in the center, titled "Status", which contains the message "Record Saved as draft" and an "OK" button.

Screen: Save as Draft

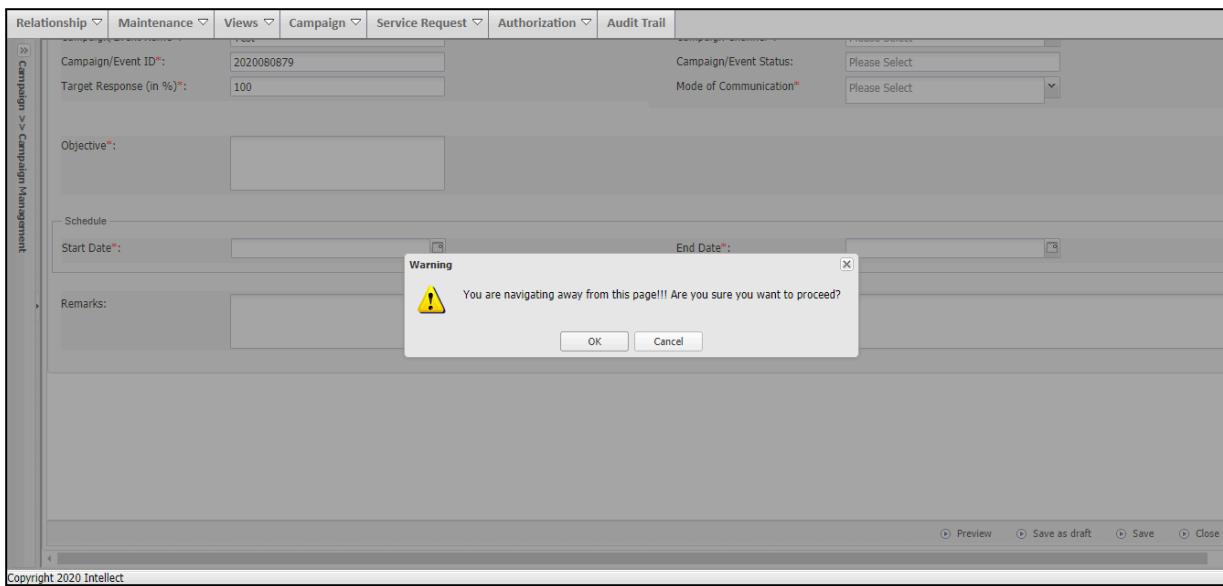
- Save** - Click on the “Save” button to Save the campaign details. After the campaign has been saved, it goes to the **Supervisor for Approval**



The screenshot shows the same software interface as the previous one, but now the campaign record has been successfully saved. A modal dialog box is displayed in the center, titled "Status", which contains the message "Record Saved Successfully" and an "OK" button. The input fields and dropdown menus are visible in the background.

Screen: Save Campaign

- Close** - Click on the “Close” and then “Ok” button on the subsequent overlay to navigate back to the campaign management screen

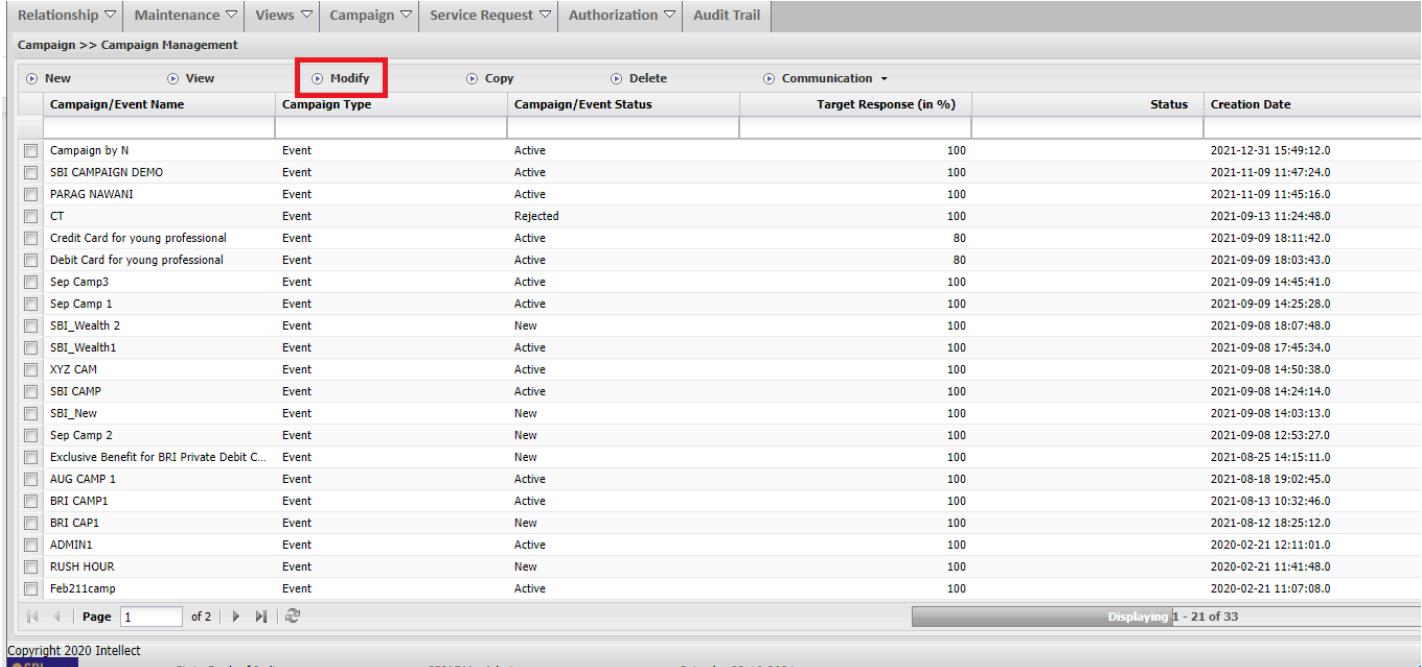


The screenshot shows a campaign management interface. At the top, there are dropdown menus for Relationship, Maintenance, Views, Campaign, Service Request, Authorization, and Audit Trail. Below this, a search bar contains 'Campaign/Event ID: 2020080879' and 'Target Response (in %): 100'. To the right, there are fields for 'Campaign/Event Status' (set to 'Please Select') and 'Mode of Communication' (also set to 'Please Select'). A large text area for 'Objective*' is empty. Under 'Schedule', 'Start Date:' and 'End Date:' fields are present. A 'Remarks' field is also empty. In the bottom right corner of the main form, there is a 'Warning' dialog box with a yellow exclamation mark icon. The message reads: 'Warning You are navigating away from this page!!! Are you sure you want to proceed?' with 'OK' and 'Cancel' buttons. At the very bottom of the screen, there are buttons for Preview, Save as draft, Save, and Close.

Screen: Close Campaign

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



The screenshot shows a list of campaigns in a table format. The columns are: Campaign/Event Name, Campaign Type, Campaign/Event Status, Target Response (in %), Status, and Creation Date. The 'Modify' button in the header is highlighted with a red box. The table lists various campaigns such as 'Campaign by N', 'SBI CAMPAIGN DEMO', 'PARAG NAVANI', etc. Each row has a checkbox in the first column. At the bottom, there are navigation buttons for Page, and a status bar at the bottom right says 'Displaying 1 - 21 of 33'.

Screen: Modify an Existing Campaign

- On the Modify Campaign screen, the User can navigate through the following tabs to capture campaign details:
 - General** - Modify General information such as Campaign Name, Channel etc.

Relationship ▾ Maintenance ▾ Views ▾ Campaign ▾ Service Request ▾ Authorization ▾ Audit Trail

Campaign >> Campaign Management >> Modify

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

Campaign/Event Name*:	Test	Campaign Channel*:	SMS-2 Way and Email
Campaign/Event ID*:	2020080879	Campaign/Event Status:	New
Target Response (in %)*:	100	Mode of Communication*	Email
Objective*:	Increase reach		
Schedule			
Start Date*:	17-Nov-2020	End Date*:	17-Nov-2020
Remarks:			

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Screen: Modify General Information

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

Relationship ▾ Maintenance ▾ Views ▾ Campaign ▾ Service Request ▾ Authorization ▾ Audit Trail

Campaign >> Campaign Management >> Modify

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

Add **Delete**

Cost Type	Budget	Actual Cost	Currency
-----------	--------	-------------	----------

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Screen: Modify Financial Information

c. **Admin** - Modify Campaign Manager details, selected target list

Relationship ▾ Maintenance ▾ Views ▾ Campaign ▾ Service Request ▾ Authorization ▾ Audit Trail

Campaign >> Campaign Management >> Modify

General Financials Admin Campaign Notes Brochure(s)

Owner Details

Campaign Manager Name * PBO Campaign Manager Contact No:

Campaign Manager Email:

List Management

Add Delete List Name Rule Criteria View

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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

Relationship ▾ Maintenance ▾ Views ▾ Campaign ▾ Service Request ▾ Authorization ▾ Audit Trail

Campaign >> Campaign Management >> Modify

General Financials Admin Campaign Notes Brochure(s)

Email*

Subject*: Test

Tahoma | B | I | U | A | X | | | | | | |

Test

Signature*: Regards

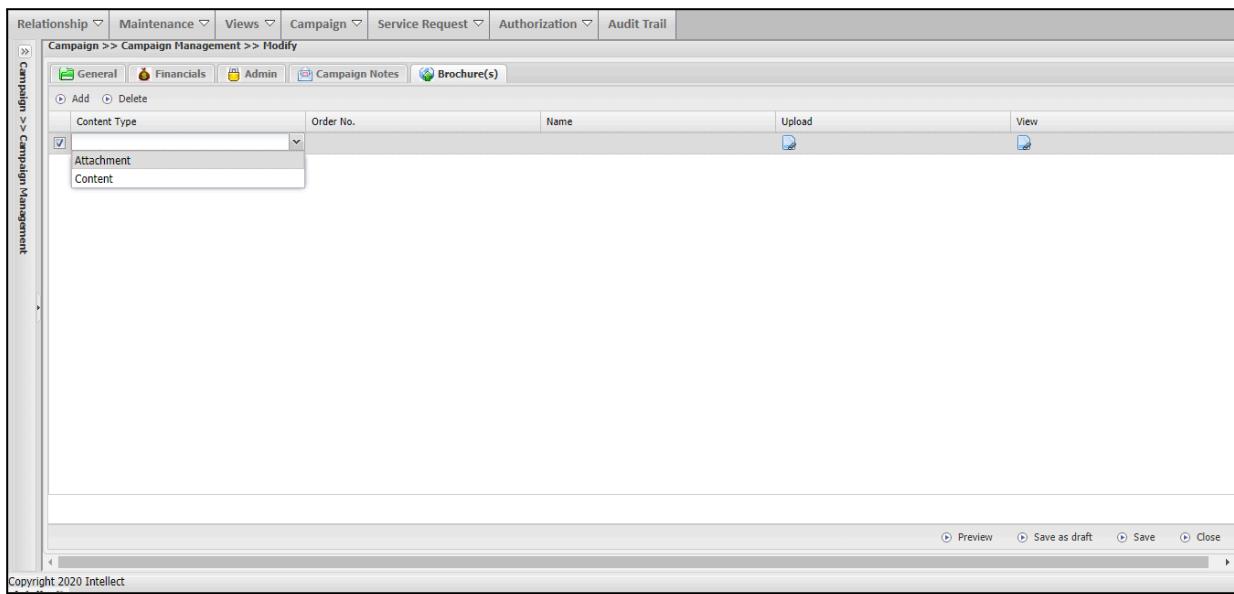
SMS*

Test

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Screen: Modify Campaign Notes

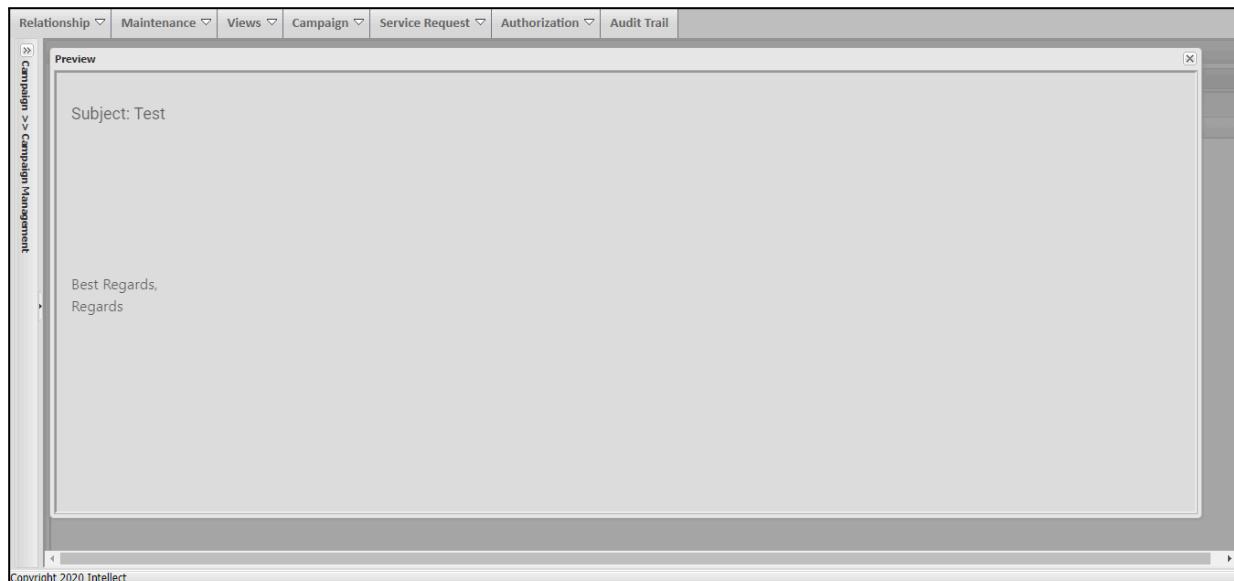
e. **Brochure** - Attach/Remove brochures related to the campaign



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Screen: Attach/Remove Brochures

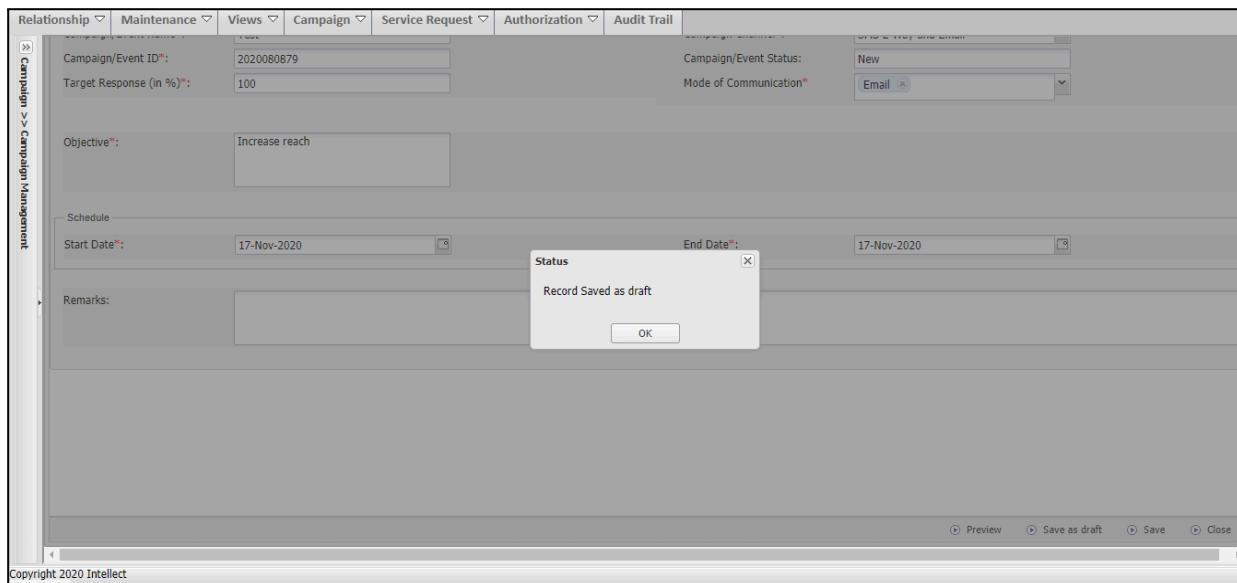
3. After the User has modified all relevant details related to the campaign, they can perform the following actions:
 - a. **Preview** - Click on the “Preview” button to view the Email details related to the campaign



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Screen: Preview Email

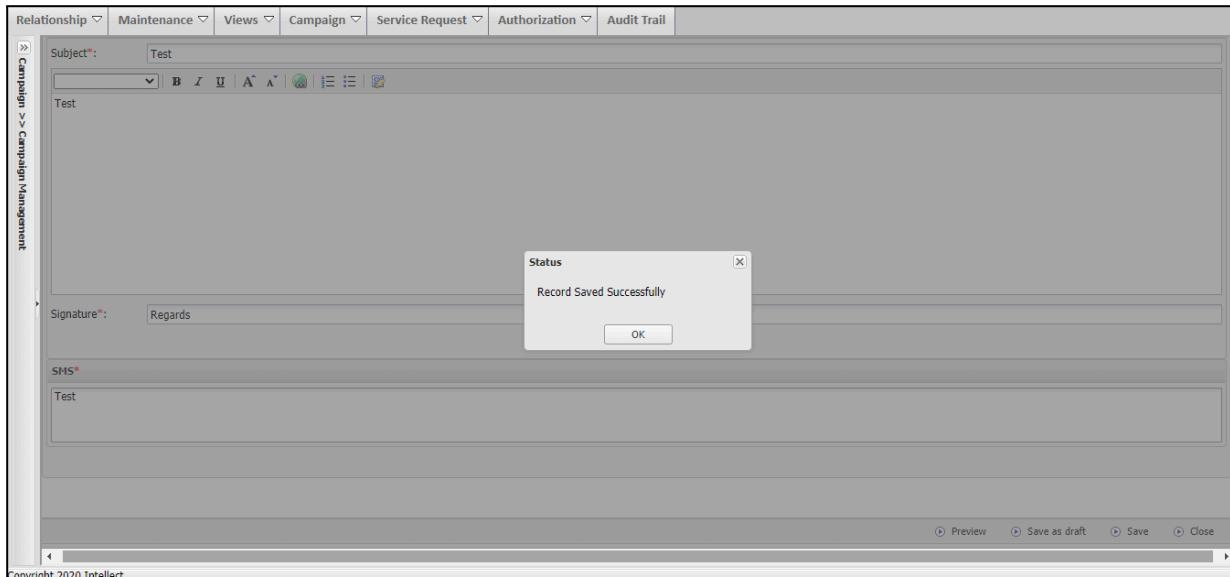
3. After the User has modified all relevant details related to the campaign, they can perform the following actions:
 - b. **Save as Draft** - Click on the “Save as Draft” button to save the campaign in draft mode. The draft can be viewed/modified from the Campaign Management screen



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Screen: Save as Draft

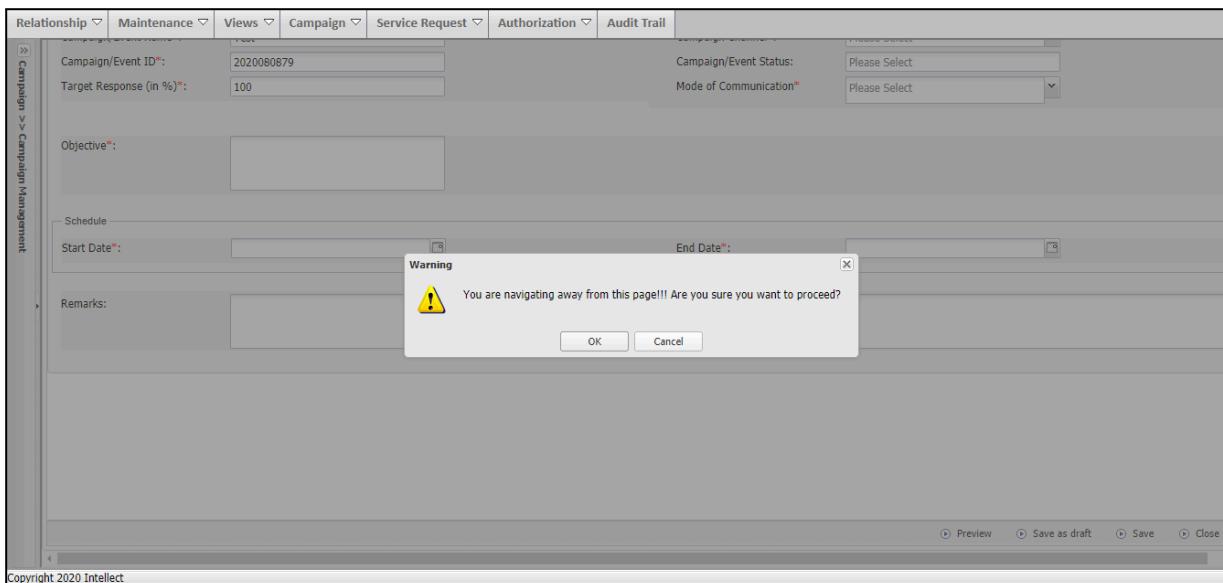
- Save** - Click on the “Save” button to Save the campaign details. After the campaign has been saved, it goes to the **Supervisor for Approval**



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Screen: Save Campaign

- Close** - Click on the “Close” and then “Ok” button on the subsequent overlay to navigate back to the Campaign Management screen

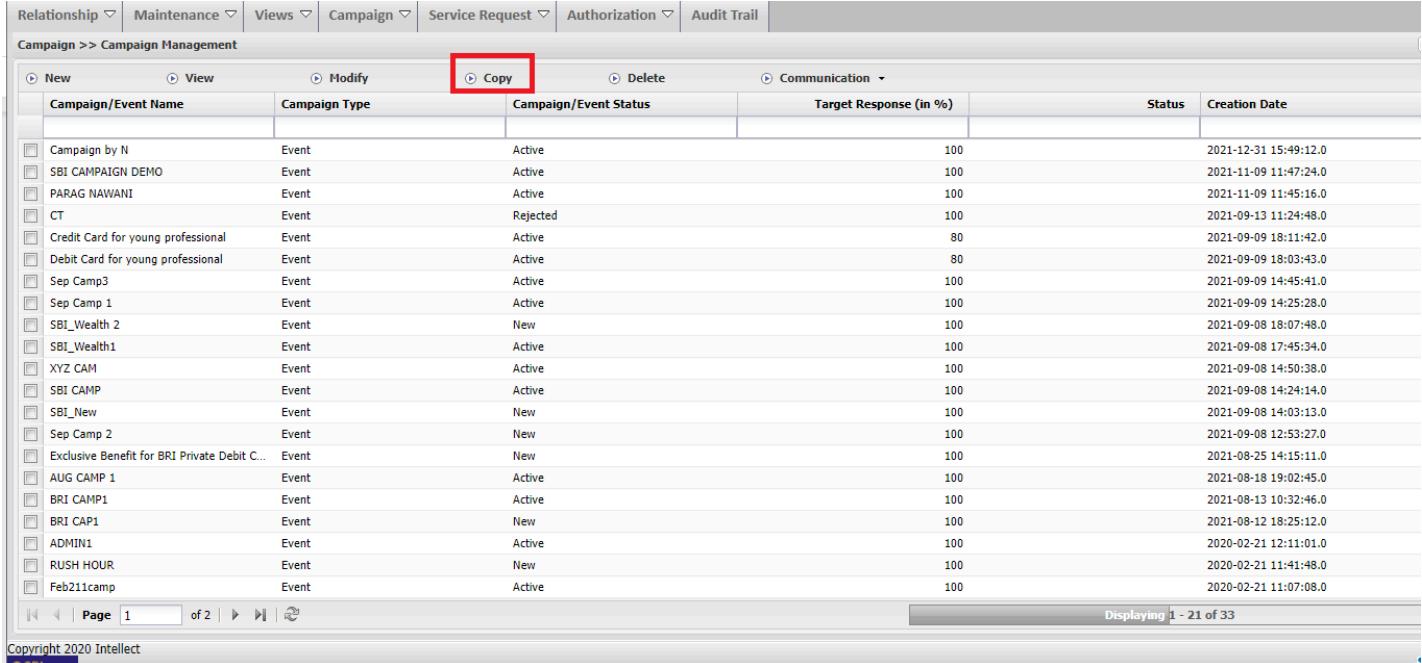


Copyright 2020 Intellect

Screen: Close Campaign

4.3.3 Copy a Campaign

- On 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



<input type="checkbox"/>	Campaign/Event Name	Campaign Type	Campaign/Event Status	Target Response (in %)	Status	Creation Date
<input type="checkbox"/>	Campaign by N	Event	Active	100		2021-12-31 15:49:12.0
<input type="checkbox"/>	SBI CAMPAIGN DEMO	Event	Active	100		2021-11-09 11:47:24.0
<input type="checkbox"/>	PARAG NAVANI	Event	Active	100		2021-11-09 11:45:16.0
<input type="checkbox"/>	CT	Event	Rejected	100		2021-09-13 11:24:48.0
<input type="checkbox"/>	Credit Card for young professional	Event	Active	80		2021-09-09 18:11:42.0
<input type="checkbox"/>	Debit Card for young professional	Event	Active	80		2021-09-09 18:03:43.0
<input type="checkbox"/>	Sep Camp3	Event	Active	100		2021-09-09 14:45:41.0
<input type="checkbox"/>	Sep Camp 1	Event	Active	100		2021-09-09 14:25:28.0
<input type="checkbox"/>	SBI_Wealth 2	Event	New	100		2021-09-08 18:07:48.0
<input type="checkbox"/>	SBI_Wealth1	Event	Active	100		2021-09-08 17:45:34.0
<input type="checkbox"/>	XYZ CAM	Event	Active	100		2021-09-08 14:50:38.0
<input type="checkbox"/>	SBI_CAMP	Event	Active	100		2021-09-08 14:24:14.0
<input type="checkbox"/>	SBI_New	Event	New	100		2021-09-08 14:03:13.0
<input type="checkbox"/>	Sep Camp 2	Event	New	100		2021-09-08 12:53:27.0
<input type="checkbox"/>	Exclusive Benefit for BRI Private Debit C...	Event	New	100		2021-08-25 14:15:11.0
<input type="checkbox"/>	AUG CAMP 1	Event	Active	100		2021-08-18 19:02:45.0
<input type="checkbox"/>	BRI_CAMP1	Event	Active	100		2021-08-13 10:32:46.0
<input type="checkbox"/>	BRI_CAP1	Event	New	100		2021-08-12 18:25:12.0
<input type="checkbox"/>	ADMIN1	Event	Active	100		2020-02-21 12:11:01.0
<input type="checkbox"/>	RUSH HOUR	Event	New	100		2020-02-21 11:41:48.0
<input type="checkbox"/>	Feb21icamp	Event	Active	100		2020-02-21 11:07:08.0

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Screen: Copy an Existing Campaign

- On the Copy Campaign screen, the User can navigate through the following tabs to capture campaign details:
 - General** - Copy/Modify General Information such as Campaign Name, Channel etc.

Relationship ▾ Maintenance ▾ Views ▾ Campaign ▾ Service Request ▾ Authorization ▾ Audit Trail

Campaign >> Campaign Management >> Copy

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

Campaign/Event Name*:	<input type="text"/>	Campaign Channel*:	SMS-2 Way and Email
Campaign/Event ID*:	<input type="text"/>	Campaign/Event Status:	New
Target Response (in %)*:	100	Mode of Communication*	Email
Objective*:	Increase reach		
Schedule			
Start Date*:	17-Nov-2020	End Date*:	17-Nov-2020
Remarks:			

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Preview Save as draft Save Close

Screen: General Information

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

Relationship ▾ Maintenance ▾ Views ▾ Campaign ▾ Service Request ▾ Authorization ▾ Audit Trail

Campaign >> Campaign Management >> Copy

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

<input checked="" type="checkbox"/> Cost Type	Budget	Actual Cost	Currency
<input checked="" type="checkbox"/> Please Select	<input type="text"/>		INR-Indian Rupee
<input type="checkbox"/> Advertisement Cost <input type="checkbox"/> Campaign Cost			

Copyright 2020 Intellect

Preview Save as draft Save Close

Screen: Financial Information

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

Relationship ▾ Maintenance ▾ Views ▾ Campaign ▾ Service Request ▾ Authorization ▾ Audit Trail

Campaign >> Campaign Management >> Copy

General Financials Admin Campaign Notes Brochure(s)

Owner Details

Campaign Manager Name*: Please Select Campaign Manager Contact No: _____

Campaign Manager Email: _____

List Management

Add	Delete	List Name	Rule Criteria	View
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Please Select		

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Preview Save as draft Save Close

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

Relationship ▾ Maintenance ▾ Views ▾ Campaign ▾ Service Request ▾ Authorization ▾ Audit Trail

Campaign >> Campaign Management >> Copy

General Financials Admin Campaign Notes Brochure(s)

Email*

Subject*: Test

Tahoma           

Test

Signature*: Regards

SMS*

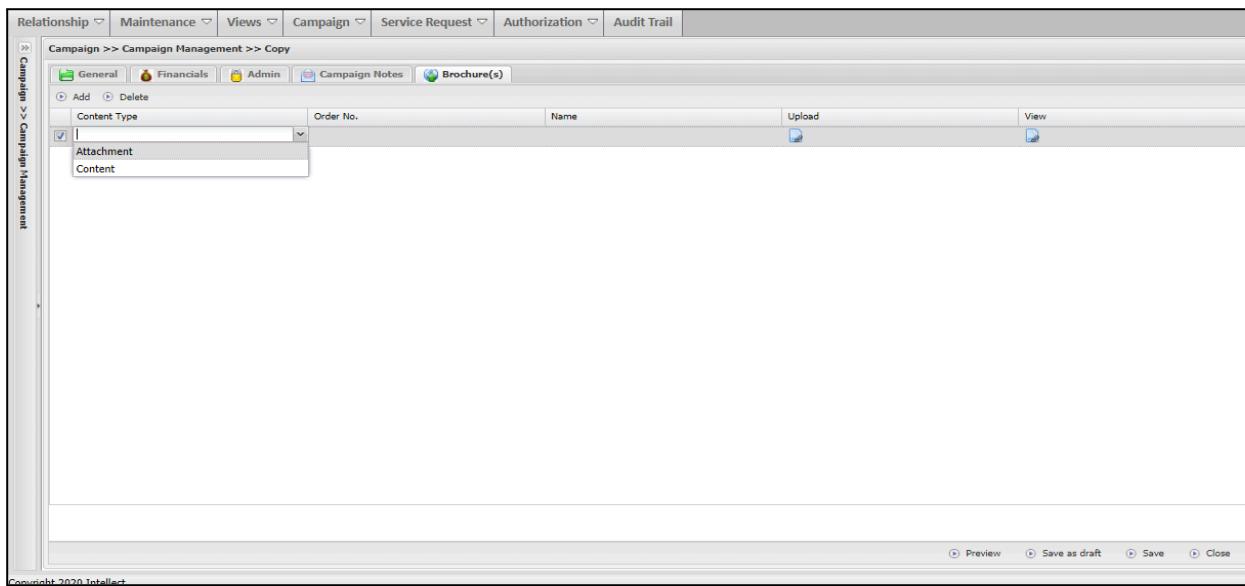
Test

Copyright 2020 Intellect

Preview Save as draft Save Close

Screen: Campaign Notes

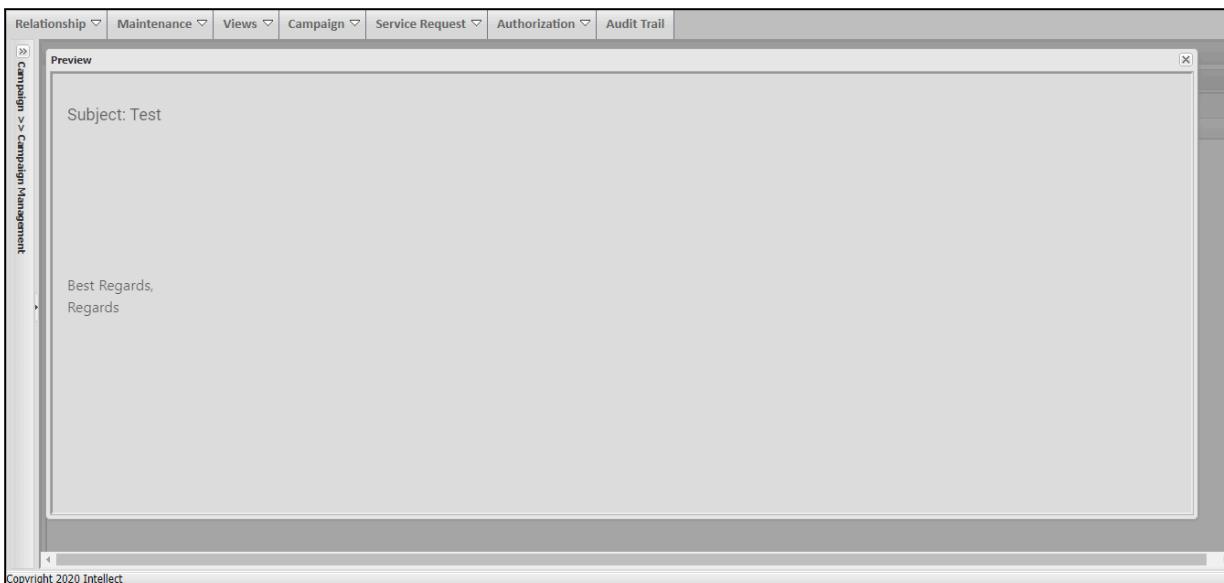
- e. **Brochure** - Attach/Remove brochures related to the campaign



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Screen: Attach/Remove Brochures

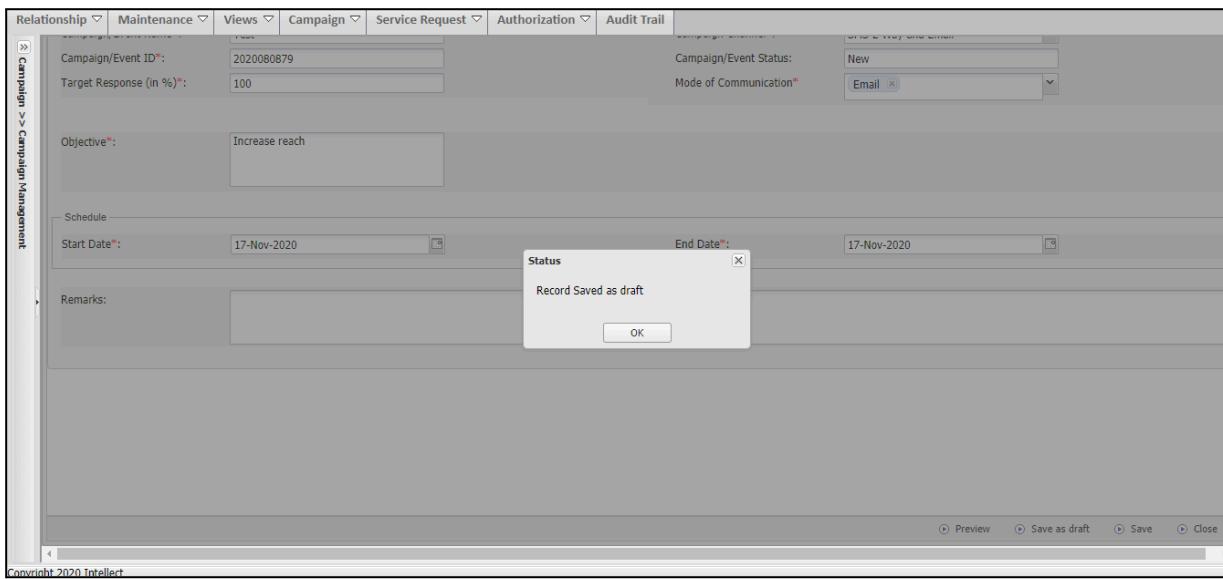
3. After the User has copied/modified all relevant details related to the campaign, they can perform the following actions:
 - a. **Preview** - Click on the “Preview” button to view the Email details related to the campaign



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Screen: Preview Email

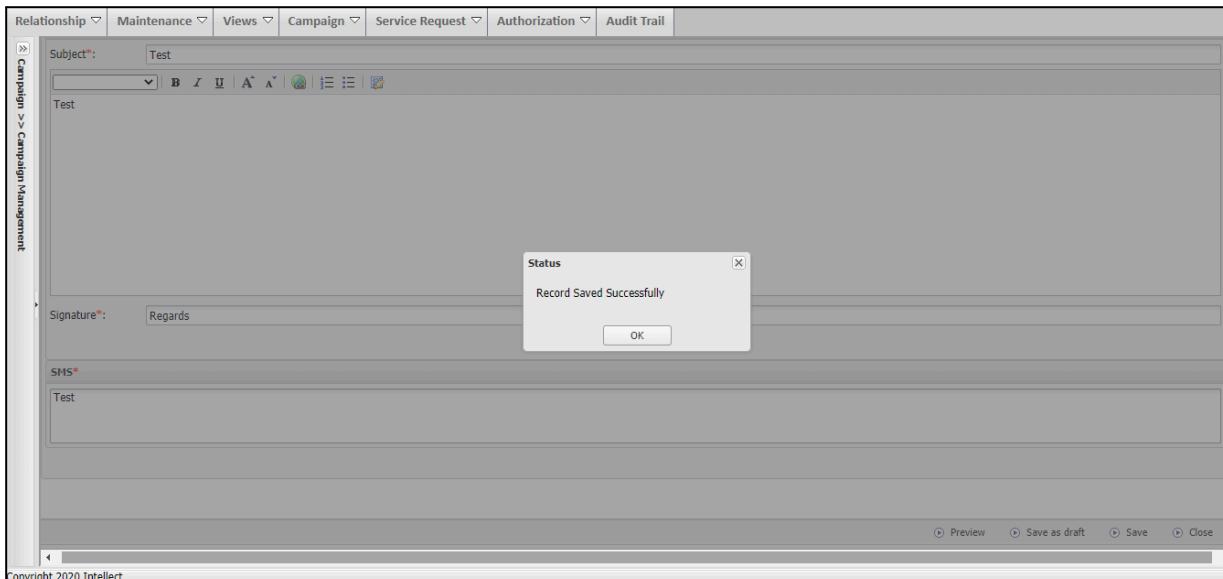
- b. **Save as Draft** - Click on the “Save as Draft” button to save the campaign in draft mode. The draft can be viewed/modified from the Campaign Management screen



The screenshot shows the Intellect software interface for Campaign Management. The main window displays campaign details: Campaign/Event ID: 202008079, Target Response (in %): 100, Objective: Increase reach, Start Date: 17-Nov-2020, and End Date: 17-Nov-2020. A status message box is overlaid on the screen, stating "Record Saved as draft" with an "OK" button.

Screen: Save as Draft

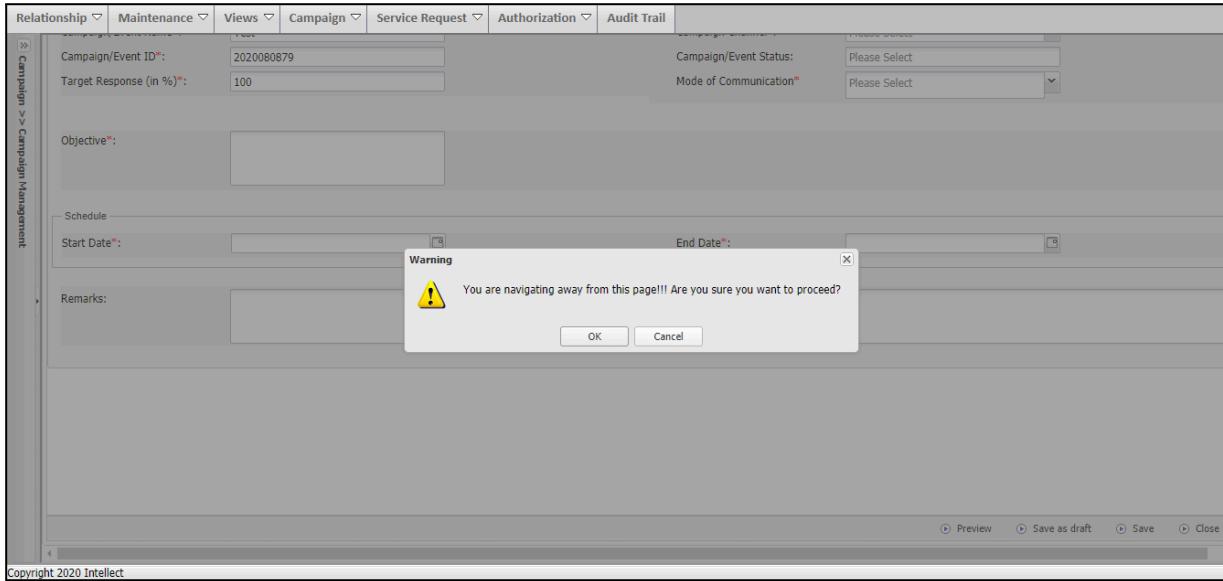
- Save** - Click on the “Save” button to Save the campaign details. After the campaign has been saved, it goes to the **Supervisor for Approval**



The screenshot shows the Intellect software interface for Campaign Management. The main window displays campaign details: Subject: Test, Signature: Regards, and SMS: Test. A status message box is overlaid on the screen, stating "Record Saved Successfully" with an "OK" button.

Screen: Save Campaign

- Close** - Click on the “Close” and then “Ok” button on the subsequent overlay to navigate back to the Campaign Management screen

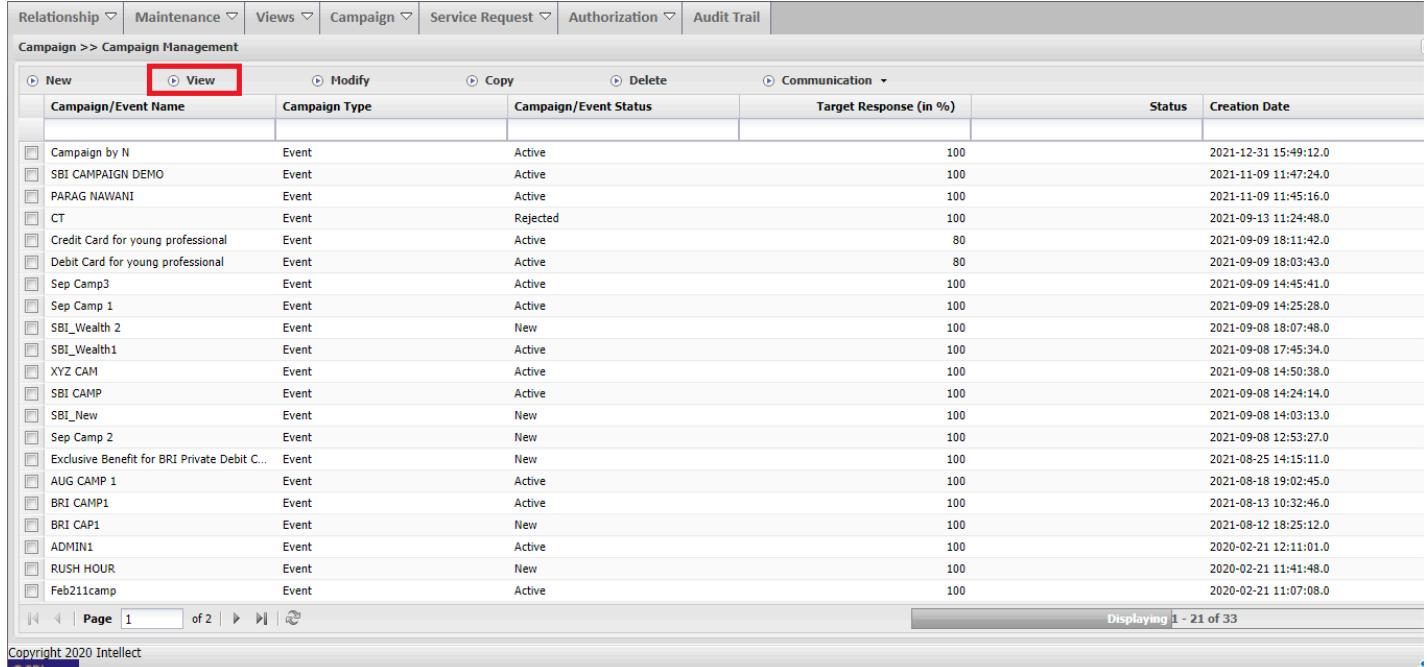


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Screen: Close Campaign

4.3.4 View a Campaign

- On 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/Event Name	Campaign Type	Campaign/Event Status	Target Response (in %)	Status	Creation Date
Campaign by N	Event	Active	100		2021-12-31 15:49:12.0
SBI CAMPAIGN DEMO	Event	Active	100		2021-11-09 11:47:24.0
PARAG NAWANI	Event	Active	100		2021-11-09 11:45:16.0
CT	Event	Rejected	100		2021-09-13 11:24:48.0
Credit Card for young professional	Event	Active	80		2021-09-09 18:11:42.0
Debit Card for young professional	Event	Active	80		2021-09-09 18:03:43.0
Sep Camp3	Event	Active	100		2021-09-09 14:45:41.0
Sep Camp 1	Event	Active	100		2021-09-09 14:25:28.0
SBI_Wealth 2	Event	New	100		2021-09-08 18:07:48.0
SBI_Wealth1	Event	Active	100		2021-09-08 17:45:34.0
XYZ CAM	Event	Active	100		2021-09-08 14:50:38.0
SBI CAMP	Event	Active	100		2021-09-08 14:24:14.0
SBI_New	Event	New	100		2021-09-08 14:03:13.0
Sep Camp 2	Event	New	100		2021-09-08 12:53:27.0
Exclusive Benefit for BRI Private Debit C...	Event	New	100		2021-08-25 14:15:11.0
AUG CAMP 1	Event	Active	100		2021-08-18 19:02:45.0
BRI CAMP1	Event	Active	100		2021-08-13 10:32:46.0
BRI CAP1	Event	New	100		2021-08-12 18:25:12.0
ADMIN1	Event	Active	100		2020-02-21 12:11:01.0
RUSH HOUR	Event	New	100		2020-02-21 11:41:48.0
Feb211camp	Event	Active	100		2020-02-21 11:07:08.0

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Screen: View Campaign

- On the View Campaign screen, the User can navigate through the following tabs to view campaign details:
 - General** - View General Information such as Campaign Name, Channel etc.

Relationship ▾ Maintenance ▾ Views ▾ Campaign ▾ Service Request ▾ Authorization ▾ Audit Trail

Campaign >> Campaign Management >> View

General Financials Admin Campaign Notes Brochure(s)

Campaign/Event Name*:	Invitation to Wealth	Campaign Channel*:	SMS-1 Way and Email	
Campaign/Event ID*:	2020080875	Campaign/Event Status:	Active	
Target Response (in %)*:	100	Mode of Communication*:	SMS Telephone Email	
Objective*:	Onboard the newly allocated prospects as wealth customers			
Schedule	Start Date*:	10-Aug-2020	End Date*:	31-Aug-2020
Remarks:				

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Screen: General Information

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

Relationship ▾ Maintenance ▾ Views ▾ Campaign ▾ Service Request ▾ Authorization ▾ Audit Trail

Campaign >> Campaign Management >> View

General Financials Admin Campaign Notes Brochure(s)

Cost Type	Budget	Actual Cost	Currency
Cost Type	5,000,000		IDR-Rupiah
Campaign Cost			

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Screen: Financial Information

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

Relationship ▾ Maintenance ▾ Views ▾ Campaign ▾ Service Request ▾ Authorization ▾ Audit Trail

Campaign >> Campaign Management >> View

Campaign >> Campaign Management

General Financials Admin Campaign Notes Brochure(s)

Owner Details

Campaign Manager Name: PBO
Campaign Manager Email:

Campaign Manager Contact No:

List Management

List Name	Rule Criteria	View
10.8.2020.1.0.49.CoreBankingCustomer1008	UPLOAD	

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Screen: Admin details

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

Relationship ▾ Maintenance ▾ Views ▾ Campaign ▾ Service Request ▾ Authorization ▾ Audit Trail

Campaign >> Campaign Management >> View

Campaign >> Campaign Management

General Financials Admin Campaign Notes Brochure(s)

Email*

Subject*: Invitation to Wealth management

Tahoma | B | I | U | A⁺ | A⁻ | | | |

Dear user,
BRI is pleased to extend wealth services. RM Aziz will contact you regarding the services.

Signature*: BRI

SMS*

Dear user,
BRI is pleased to extend wealth services. RM Aziz will contact you regarding the services.

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Screen: Campaign Notes

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

Relationship ▾ Maintenance ▾ Views ▾ Campaign ▾ Service Request ▾ Authorization ▾ Audit Trail

Campaign >> Campaign Management >> View

Brochure(s)

Content Type	Order No.	Name	Upload	View
Content	123	Bank BRI.jpeg		
Attachment	345	Campaign Picture.png		

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Screen: Attach/Remove Brochures

- After the User has viewed all relevant details in the campaign, they can click on the “Double Arrow” button on the top left corner of the screen, and subsequently on the “Ok” button to navigate back to the Campaign Management screen

Relationship ▾ Maintenance ▾ Views ▾ Campaign ▾ Service Request ▾ Authorization ▾ Audit Trail

 Campaign >> Campaign Management >> View

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

Campaign/Event Name*:	Invitation to Wealth	Campaign Channel*:	SMS-1 Way and Email
Campaign/Event ID*:	2020080875	Campaign/Event Status:	Active
Target Response (in %)*:	100	Mode of Communication*:	SMS <input checked="" type="checkbox"/> Telephone <input type="checkbox"/> Email <input type="checkbox"/>

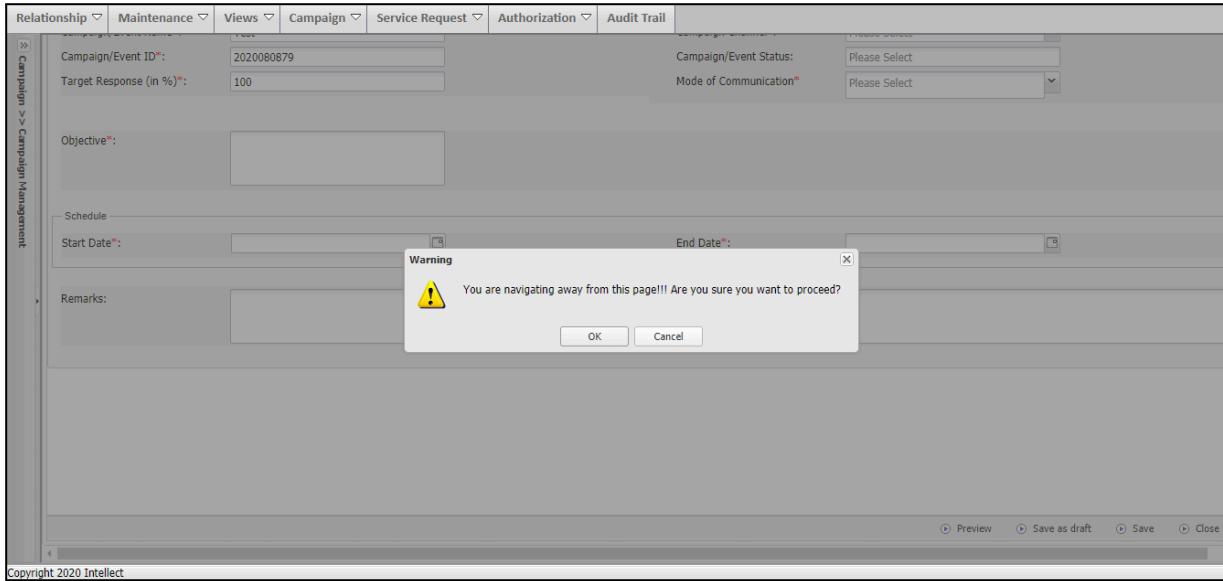
Objective*:
Onboard the newly allocated prospects as wealth customers

Schedule
Start Date*: 10-Aug-2020 End Date*: 31-Aug-2020

Remarks:

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Screen: Close Campaign

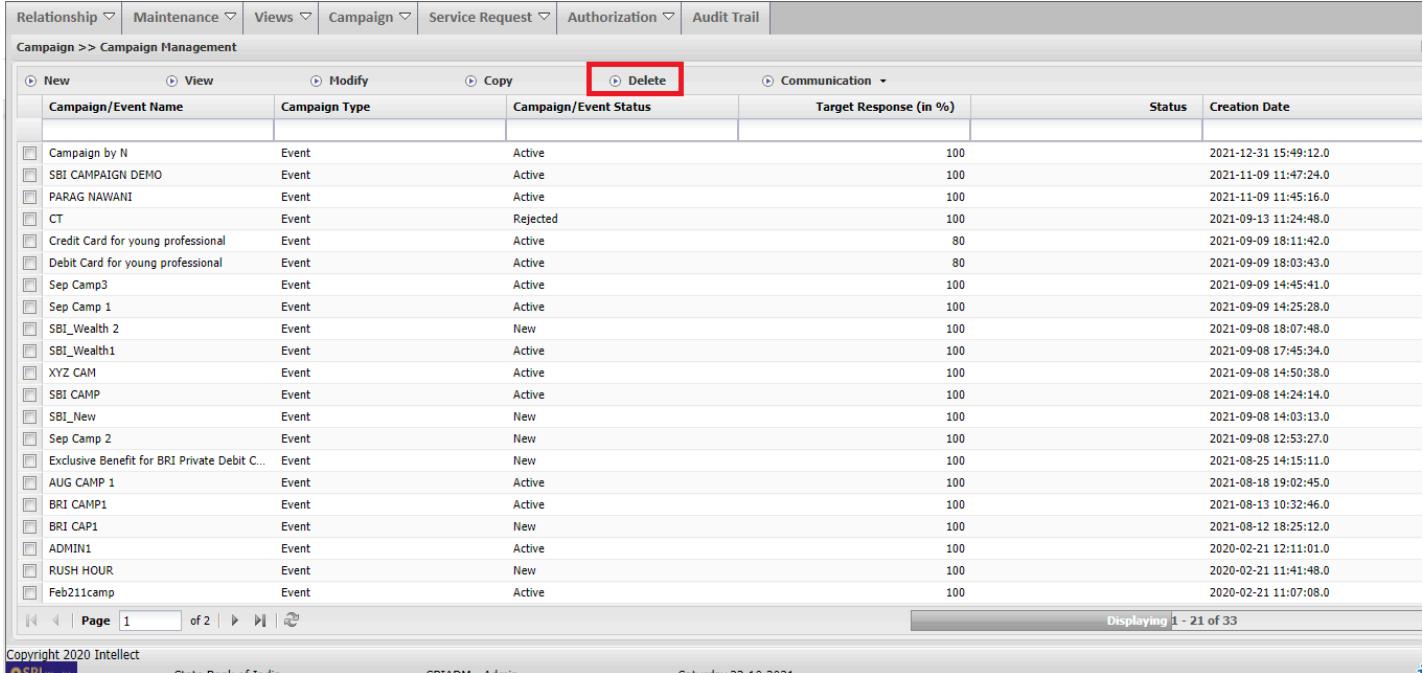


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Screen: Close Campaign

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 campaign



Campaign/Event Name	Campaign Type	Campaign/Event Status	Target Response (in %)	Status	Creation Date
Campaign by N	Event	Active	100		2021-12-31 15:49:12.0
SBI CAMPAIGN DEMO	Event	Active	100		2021-11-09 11:47:24.0
PARAG NAWANI	Event	Active	100		2021-11-09 11:45:16.0
CT	Event	Rejected	100		2021-09-13 11:24:48.0
Credit Card for young professional	Event	Active	80		2021-09-09 18:11:42.0
Debit Card for young professional	Event	Active	80		2021-09-09 18:03:43.0
Sep Camp3	Event	Active	100		2021-09-09 14:45:41.0
Sep Camp 1	Event	Active	100		2021-09-09 14:25:28.0
SBL_Wealth 2	Event	New	100		2021-09-08 18:07:48.0
SBL_Wealth1	Event	Active	100		2021-09-08 17:45:34.0
XYZ CAM	Event	Active	100		2021-09-08 14:50:38.0
SBI CAMP	Event	Active	100		2021-09-08 14:24:14.0
SBL_New	Event	New	100		2021-09-08 14:03:13.0
Sep Camp 2	Event	New	100		2021-09-08 12:53:27.0
Exclusive Benefit for BRI Private Debit C...	Event	New	100		2021-08-25 14:15:11.0
AUG CAMP 1	Event	Active	100		2021-08-18 19:02:45.0
BRI CAMP1	Event	Active	100		2021-08-13 10:32:46.0
BRI CAP1	Event	New	100		2021-08-12 18:25:12.0
ADMIN1	Event	Active	100		2020-02-21 12:11:01.0
RUSH HOUR	Event	New	100		2020-02-21 11:41:48.0
Feb211camp	Event	Active	100		2020-02-21 11:07:08.0

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Screen: Delete Campaign

- On the Delete Campaign screen, the User can navigate through the following tabs to view campaign details:
 - General** - View General Information such as Campaign Name, Channel etc.

Campaign >> Campaign Management >> Delete

Campaign/Event Name* : Test Campaign 17112020	Campaign Channel* : SMS-2 Way and Email
Campaign/Event ID* : 2020080880	Campaign/Event Status : New
Target Response (in %)* : 100	Mode of Communication* : Email
Objective* : Increase reach	
Schedule	
Start Date* : 17-Nov-2020	End Date* : 17-Nov-2020
Remarks:	

[Delete](#)

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Screen: General Information

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

Campaign >> Campaign Management >> Delete

Cost Type	Budget	Actual Cost	Currency

[Delete](#)

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Screen: Financial Information

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

Relationship ▾ Maintenance ▾ Views ▾ Campaign ▾ Service Request ▾ Authorization ▾ Audit Trail

Campaign >> Campaign Management >> Delete

General Financials Admin Campaign Notes Brochure(s)

Owner Details

Campaign Manager Name: THANONG

Campaign Manager Contact No:

Campaign Manager Email:

List Management

List Name	Rule Criteria	View

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Screen: Admin details

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

Relationship ▾ Maintenance ▾ Views ▾ Campaign ▾ Service Request ▾ Authorization ▾ Audit Trail

Campaign >> Campaign Management >> Delete

General Financials Admin Campaign Notes Brochure(s)

Email*

Subject*: Test

Fahoma B I U A A* |  Test

Signature*: Regards

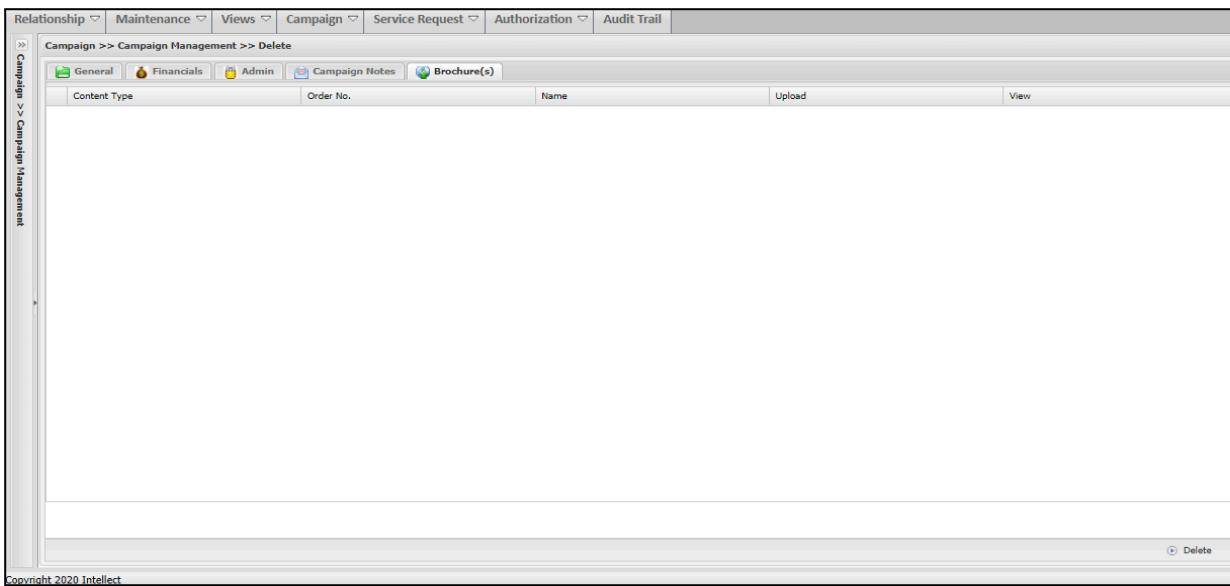
SMS*

Test

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Screen: Campaign Notes

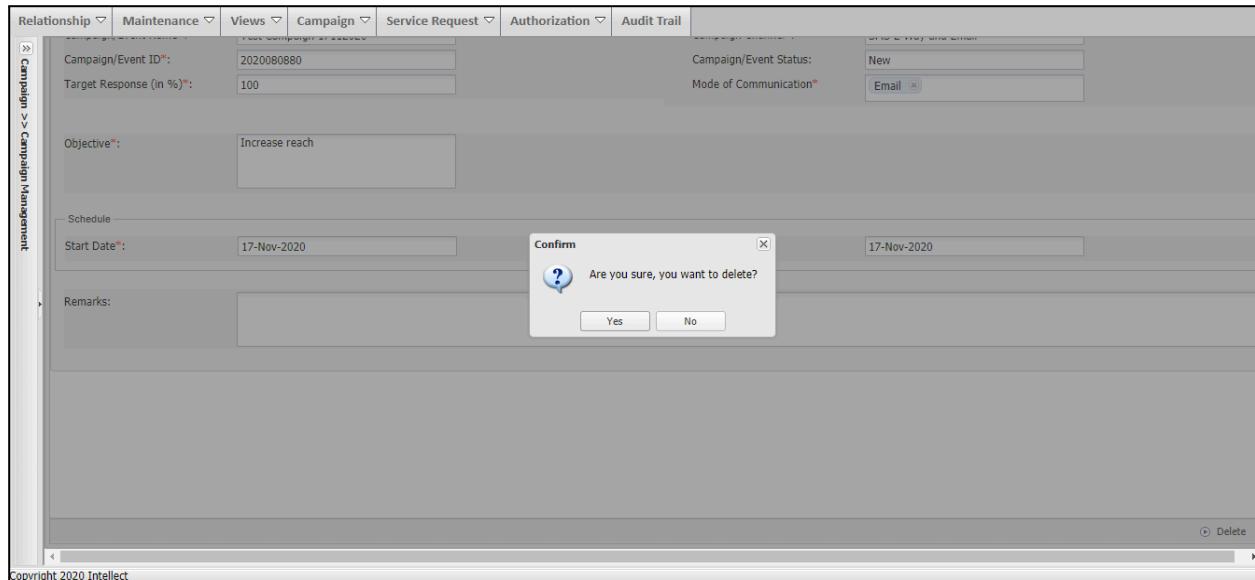
- e. **Brochure** - View brochures related to the campaign



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Screen: Brochures

3. After the User has viewed all relevant details in the campaign, they can perform the following actions:
 - a. **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



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Screen: Delete Campaign

Relationship ▾ Maintenance ▾ Views ▾ Campaign ▾ Service Request ▾ Authorization ▾ Audit Trail

Campaign >> Campaign Management >> Delete

<input type="button" value="General"/>	<input type="button" value="Financials"/>	<input type="button" value="Admin"/>	<input type="button" value="Campaign Notes"/>	<input type="button" value="Brochure(s)"/>
Campaign/Event Name*: Test Campaign 17112020	Campaign Channel*: SMS-2 Way and Email			
Campaign/Event ID*: 2020080880	Campaign/Event Status: New			
Target Response (in %)*: 100	Mode of Communication*: Email			
Objective*: Increase reach				
Schedule	Status			
Start Date*: 17-Nov-2020	Record Deleted Successfully			
Remarks:	OK			

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Screen: Campaign successfully deleted

- b. **Close** - Click on the “Double Arrow” button on the top left corner of the screen, and subsequently on the “Ok” button to navigate back to the Campaign Management screen, without deleting the campaign

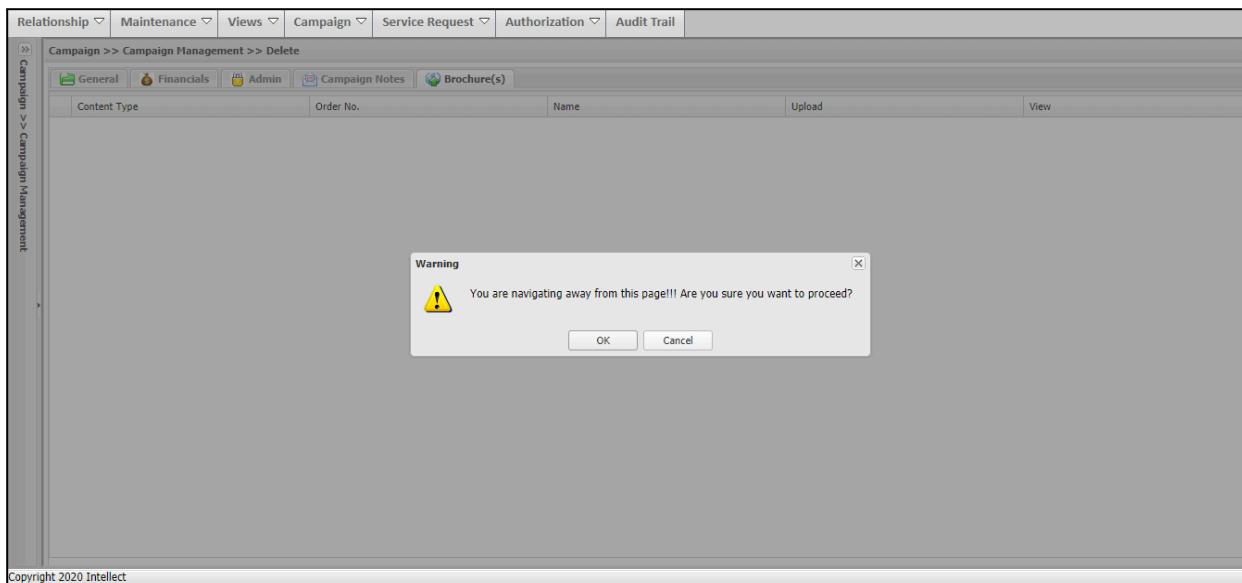
Relationship ▾ Maintenance ▾ Views ▾ Campaign ▾ Service Request ▾ Authorization ▾ Audit Trail

Campaign >> Campaign Management >> Delete

<input type="button" value="General"/>	<input type="button" value="Financials"/>	<input type="button" value="Admin"/>	<input type="button" value="Campaign Notes"/>	<input type="button" value="Brochure(s)"/>
Content Type	Order No.	Name	Upload	View

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Screen: Close Campaign



Screen: Confirm Close

4.3.6 Campaign Communication

- 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 “Communication” button

Campaign >> Campaign Management						
<input type="radio"/> New	<input type="radio"/> View	<input type="radio"/> Modify	<input type="radio"/> Copy	<input type="radio"/> Delete	<input type="radio"/> Communication	
Campaign/Event Name	Campaign Type	Campaign/Event Status	Target Response (in %)		Status	Creation Date
<input type="checkbox"/> Campaign by N	Event	Active	100		2021-12-31 15:49:12.0	
<input type="checkbox"/> SBI CAMPAIGN DEMO	Event	Active	100		2021-11-09 11:47:24.0	
<input type="checkbox"/> PARAG NAWANI	Event	Active	100		2021-11-09 11:45:16.0	
<input type="checkbox"/> CT	Event	Rejected	100		2021-09-13 11:24:48.0	
<input type="checkbox"/> Credit Card for young professional	Event	Active	80		2021-09-09 18:11:42.0	
<input type="checkbox"/> Debit Card for young professional	Event	Active	80		2021-09-09 18:03:43.0	
<input type="checkbox"/> Sep Camp3	Event	Active	100		2021-09-09 14:45:41.0	
<input type="checkbox"/> Sep Camp 1	Event	Active	100		2021-09-09 14:25:28.0	
<input type="checkbox"/> SBI_Wealth 2	Event	New	100		2021-09-08 18:07:48.0	
<input type="checkbox"/> SBI_Wealth1	Event	Active	100		2021-09-08 17:45:34.0	
<input type="checkbox"/> XYZ CAM	Event	Active	100		2021-09-08 14:50:38.0	
<input type="checkbox"/> SBI CAMP	Event	Active	100		2021-09-08 14:24:14.0	
<input type="checkbox"/> SBI_New	Event	New	100		2021-09-08 14:03:13.0	
<input type="checkbox"/> Sep Camp 2	Event	New	100		2021-09-08 12:53:27.0	
<input type="checkbox"/> Exclusive Benefit for BRI Private Debit C...	Event	New	100		2021-08-25 14:15:11.0	
<input type="checkbox"/> AUG CAMP 1	Event	Active	100		2021-08-18 19:02:45.0	
<input type="checkbox"/> BRI_CAMP1	Event	Active	100		2021-08-13 10:32:46.0	
<input type="checkbox"/> BRI_CAP1	Event	New	100		2021-08-12 18:25:12.0	
<input type="checkbox"/> ADMIN1	Event	Active	100		2020-02-21 12:11:01.0	
<input type="checkbox"/> RUSH HOUR	Event	New	100		2020-02-21 11:41:48.0	
<input type="checkbox"/> Feb211camp	Event	Active	100		2020-02-21 11:07:08.0	

Screen: Campaign Communication

- Email/SMS Communication can be selected by clicking on the Send Mail (Email) and Send SMS (SMS)

Campaign >> Campaign Management							
<input type="radio"/> New	<input type="radio"/> View	<input type="radio"/> Modify	<input type="radio"/> Copy	<input type="radio"/> Delete	<input type="radio"/> Communication		
Campaign/Event Name	Campaign Type	Campaign/Event Status				Status	Creation Date
<input type="checkbox"/> Campaign by N	Event	Active			<input type="radio"/> Send Mail	100	2021-12-31 15:49:12.0
<input type="checkbox"/> SBI CAMPAIGN DEMO	Event	Active			<input type="radio"/> Send SMS	100	2021-11-09 11:47:24.0
<input type="checkbox"/> PARAG NAWANI	Event	Active				100	2021-11-09 11:45:16.0

Screen: Campaign Communication – Send Mail/Send SMS

3. Broadcast status will be shown by the system for Send Mail/Send SMS

Campaign >> Campaign Management							
<input type="radio"/> New	<input type="radio"/> View	<input type="radio"/> Modify	<input type="radio"/> Copy	<input type="radio"/> Delete	<input type="radio"/> Communication		
Campaign/Event Name	Campaign Type	Campaign/Event Status			Target Response (in %)		Status
<input type="checkbox"/> Campaign by N	Event	Active			100		2021-12-31 15:49:12.0
<input checked="" type="checkbox"/> SBI CAMPAIGN DEMO	Event	Active			100		2021-11-09 11:47:24.0
<input type="checkbox"/> PARAG NAWANI	Event	Active			100		2021-11-09 11:45:16.0
<input type="checkbox"/> CT	Event	Rejected			100		2021-09-13 11:24:48.0
<input type="checkbox"/> Credit Card for young professional	Event	Active			80		2021-09-09 18:11:42.0
<input type="checkbox"/> Debit Card for young professional	Event	Active			80		2021-09-09 18:03:43.0
<input type="checkbox"/> Sep Camp3	Event	Active			100		2021-09-09 14:45:41.0
<input type="checkbox"/> Sep Camp 1	Event	Active			100		2021-09-09 14:25:28.0
<input type="checkbox"/> SBI_Wealth 2	Event	New			100		2021-09-08 18:07:48.0
<input type="checkbox"/> SBI_Wealth1	Event	Active			100		2021-09-08 17:45:34.0
<input type="checkbox"/> XYZ CAM	Event	Active			100		2021-09-08 14:50:38.0
<input type="checkbox"/> SBI CAMP	Event	Active			100		2021-09-08 14:24:14.0
<input type="checkbox"/> SBI_New	Event	New			100		2021-09-08 14:03:13.0
<input type="checkbox"/> Sep Camp 2	Event	New			100		2021-09-08 12:53:27.0
<input type="checkbox"/> Exclusive Benefit for BRI Private Debit C...	Event	New			100		2021-08-25 14:15:11.0
<input type="checkbox"/> AUG CAMP 1	Event	Active			100		2021-08-18 19:02:45.0
<input type="checkbox"/> BRI CAMP1	Event	Active			100		2021-08-13 10:32:46.0
<input type="checkbox"/> BRI CAP1	Event	New			100		2021-08-12 18:25:12.0
<input type="checkbox"/> ADMIN1	Event	Active			100		2020-02-21 12:11:01.0

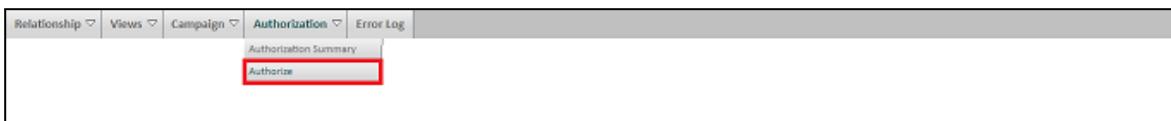
Screen: Campaign Communication – Send Mail Status

Campaign >> Campaign Management							
<input type="radio"/> New	<input type="radio"/> View	<input type="radio"/> Modify	<input type="radio"/> Copy	<input type="radio"/> Delete	<input type="radio"/> Communication		
Campaign/Event Name	Campaign Type	Campaign/Event Status			Target Response (in %)		Status
<input type="checkbox"/> Campaign by N	Event	Active			100		2021-12-31 15:49:12.0
<input type="checkbox"/> SBI CAMPAIGN DEMO	Event	Active			100		2021-11-09 11:47:24.0
<input type="checkbox"/> PARAG NAWANI	Event	Active			100		2021-11-09 11:45:16.0
<input type="checkbox"/> CT	Event	Rejected			100		2021-09-13 11:24:48.0
<input type="checkbox"/> Credit Card for young professional	Event	Active			80		2021-09-09 18:11:42.0
<input type="checkbox"/> Debit Card for young professional	Event	Active			80		2021-09-09 18:03:43.0
<input type="checkbox"/> Sep Camp3	Event	Active			100		2021-09-09 14:45:41.0
<input type="checkbox"/> Sep Camp 1	Event	Active			100		2021-09-09 14:25:28.0
<input type="checkbox"/> SBI_Wealth 2	Event	New			100		2021-09-08 18:07:48.0
<input type="checkbox"/> SBI_Wealth1	Event	Active			100		2021-09-08 17:45:34.0
<input type="checkbox"/> XYZ CAM	Event	Active			100		2021-09-08 14:50:38.0
<input type="checkbox"/> SBI CAMP	Event	Active			100		2021-09-08 14:24:14.0
<input type="checkbox"/> SBI_New	Event	New			100		2021-09-08 14:03:13.0
<input type="checkbox"/> Sep Camp 2	Event	New			100		2021-09-08 12:53:27.0
<input type="checkbox"/> Exclusive Benefit for BRI Private Debit C...	Event	New			100		2021-08-25 14:15:11.0
<input type="checkbox"/> AUG CAMP 1	Event	Active			100		2021-08-18 19:02:45.0
<input type="checkbox"/> BRI CAMP1	Event	Active			100		2021-08-13 10:32:46.0
<input type="checkbox"/> BRI CAP1	Event	New			100		2021-08-12 18:25:12.0
<input type="checkbox"/> ADMIN1	Event	Active			100		2020-02-21 12:11:01.0
<input type="checkbox"/> RUSH HOUR	Event	New			100		2020-02-21 11:41:48.0
<input type="checkbox"/> Feb211camp	Event	Active			100		2020-02-21 11:07:08.0

Screen: Campaign Communication – Send SMS Status

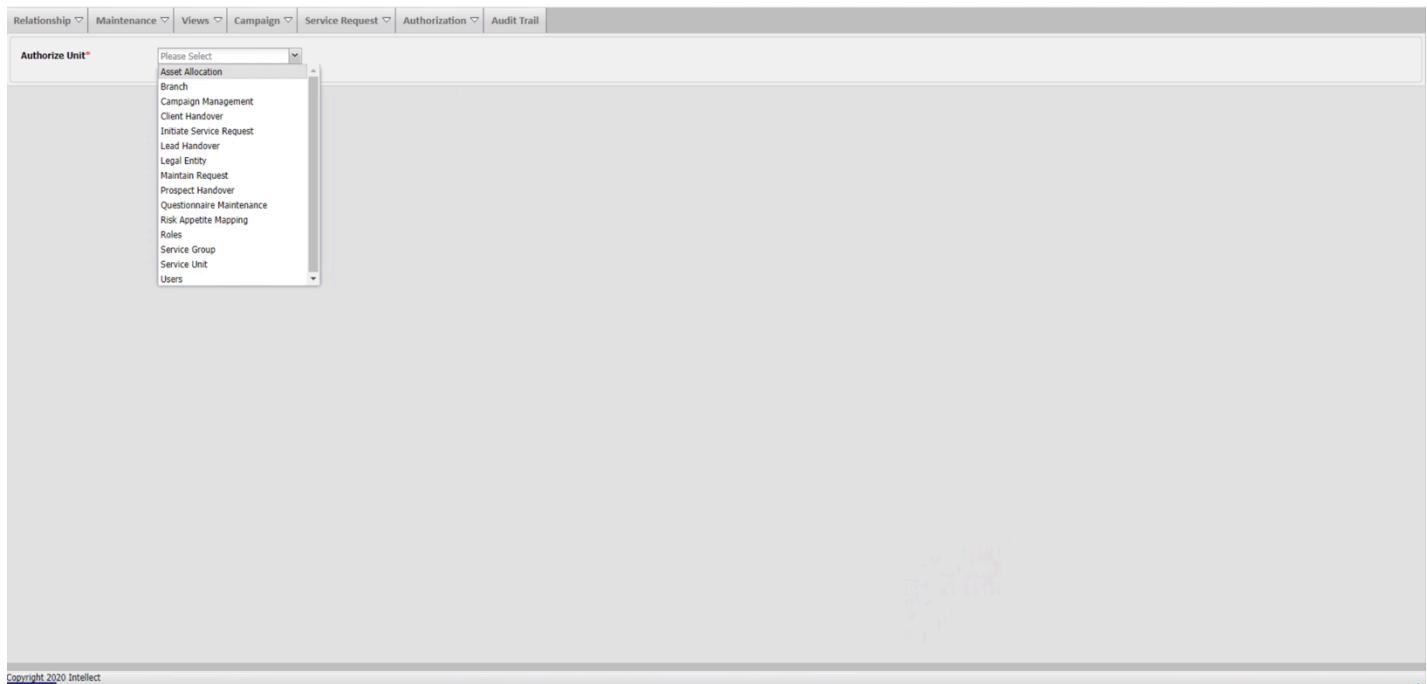
4.3.7 Supervisor Approval

1. 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
2. After logging in, the Supervisor would hover over the “Authorization” menu option and select “Authorize” sub menu from the dropdown



Screen: Click on Authorize

3. 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



Screen: Select Campaign Management

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

Relationship ▾ Maintenance ▾ Views ▾ Campaign ▾ Service Request ▾ Authorization ▾ Audit Trail

① Authorize / Reject

Campaign/Event Name	Campaign Type	Campaign/Event Status	Target Response (in %)	Status	Creation Date

No records to display

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SBI ADM - Admin Thursday,20-01-2022

Screen: Campaign to Authorize/Reject

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

Relationship ▾ Views ▾ Campaign ▾ Authorization ▾ Error Log

Authorization >> Campaign Management

General Financials Admin Campaign Notes Brochure(s)

Campaign Name (English)*:	CIMB_CAMP_DEPOSITS_1300	Campaign Name (Thai):	
Campaign Type*:	Event	Campaign Channel*:	No Contact
Campaign ID*:	2018100874	Campaign Status:	New
Target*:	123	Product Category:	Deposit
Product Type:	Please Select	Product Name:	
Product Availability:	Please Select	Supervisor Alert (Days)*:	5 Day(s)
Reward For RM:		Reward For Customer:	
Campaign Performance (in %)*:	0.00		
Objective*:	safsdg		
Schedule			
Start Date*:	23-Oct-2018	End Date*:	30-Oct-2018
Broadcast Date & Time:	25-Oct-2018 13:15	Campaign Period (Days)*:	7

Screen: Campaign General Details

- Financial** - View Financials such as Advertisement and Budget cost

Relationship ▾ Views ▾ Campaign ▾ Authorization ▾ Error Log

Authorization >> Campaign Management

Cost Type	Budget	Actual Cost	Currency

Authorize Reject

Screen: Campaign Financials

C. Admin - View Campaign Manager details, selected target List

Relationship ▾ Views ▾ Campaign ▾ Authorization ▾ Error Log

Authorization >> Campaign Management

General	Financials	Admin	Campaign Notes	Brochure(s)

Owner Details

Campaign Manager Name *	RAJANE CHAOWARAT	Campaign Manager Contact No:	<input type="text"/>
Campaign Manager Email:	<input type="text"/>		

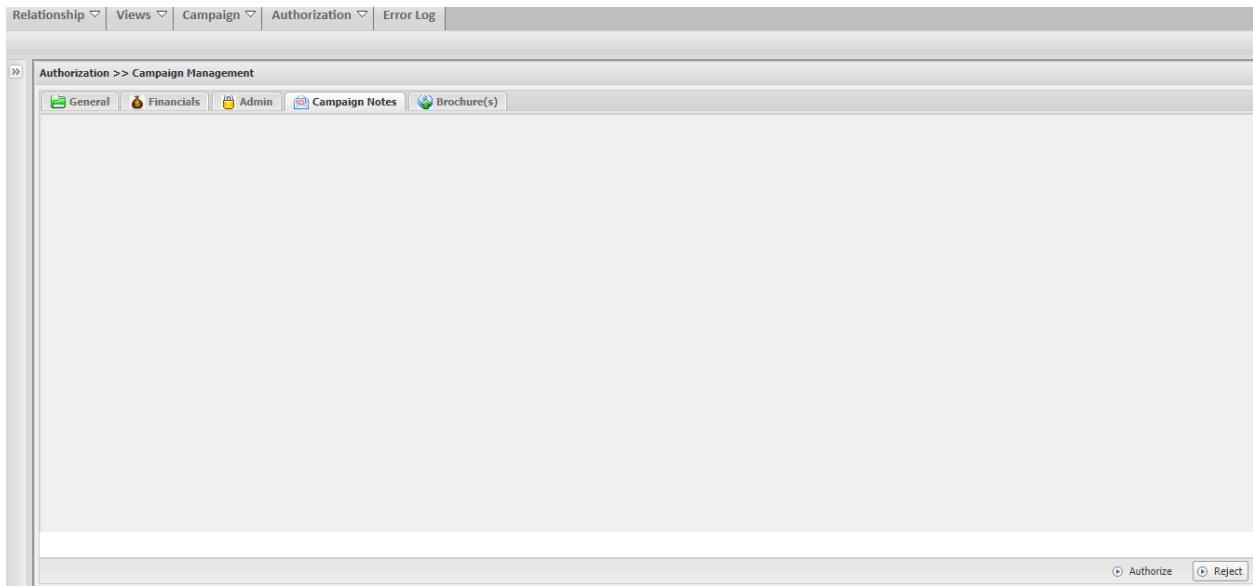
List Management

List Name	Rule Criteria	View
15.10.2018.12.12.13.List_Upload_15October	UPLOAD	

Authorize Reject

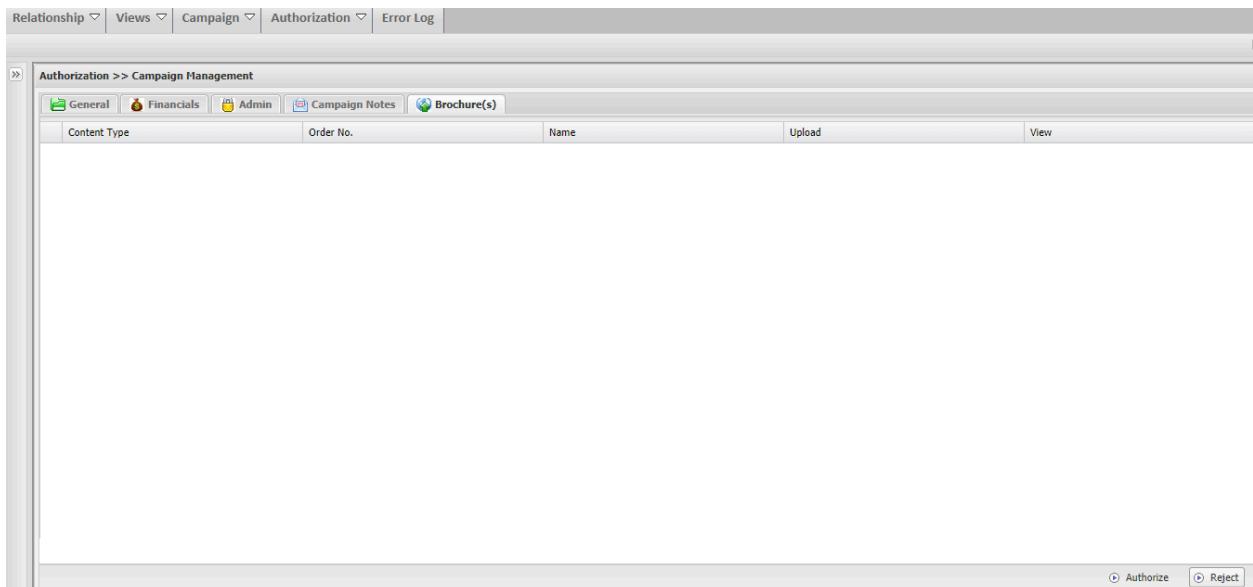
Screen: Campaign Admin details

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



Screen: Campaign Notes

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



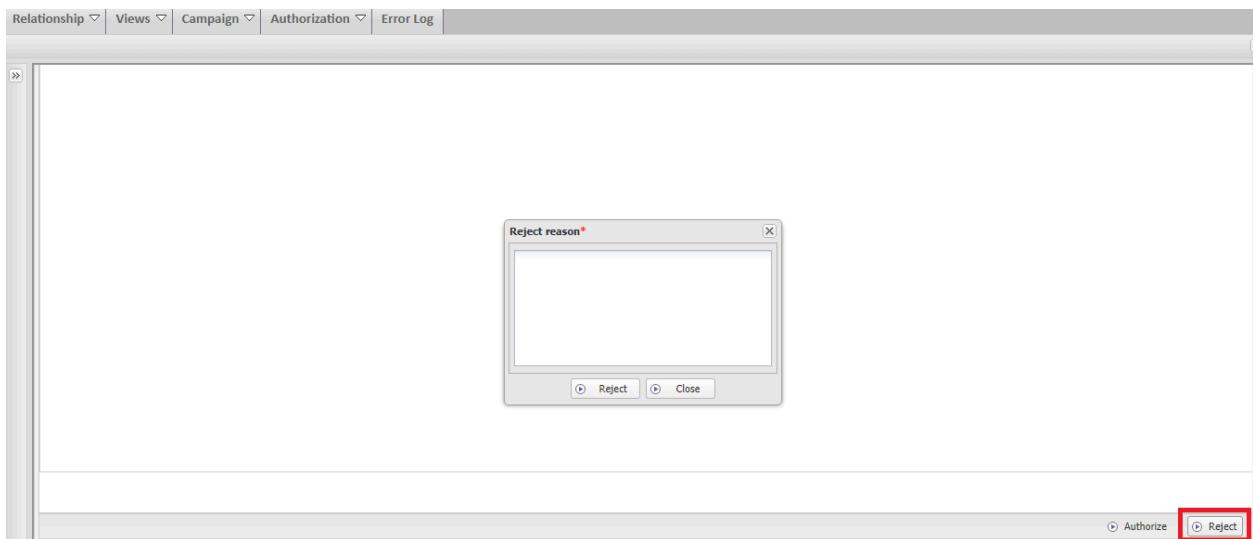
Screen: Brochures

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



Screen: Authorize the Campaign

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



Screen: Reject the Campaign and capture Reject Reason

4.3.8 View Campaign Dashboard

- 1. The Campaign Dashboard can be accessed from the PMS Module. Once the User has logged into PMS, they can navigate to the Campaign Dashboard by clicking on the Campaign Management widget on the left panel. On 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

Broadcast

- BRI Institute - 09-06-2021
- Laporan Bulanan April 2021 - 09-06-2021
- Kembangkan usahamu di Linkumkm - 09-06-2021
- Broadcast Information for BRI Private Customer - 09-06-2021

Alerts

- Customer Birthday
- Expiring Forms
- Change in Customer AUM
- New Holdings For Asset Allocation
- Risk Profile Expiry
- Goal Review Alert
- Large Withdrawal from CASA
- Expired Goal

Customer Summary

Category	Count
Total Premier	5
Net Increase	5
No Wealth	5
New to PCA	0
Existing to PCA	0

Peer-to-Peer Benchmarking

Category	Value
Total AUM	50G
Wealth AUM	1,000M
Customers with Wealth products	450
Sales	0

Screen: Navigating to the Campaign Dashboard

Campaign Management

Lead Status

Status	Count
Total	22
Contacted	16
Completed	14
Accepted	14

Search based on Campaign Name & ID: 2019090839 - CAMP2801

% Lead status by campaign

% Lead status by channel

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

The screenshot shows the SBI Wealth Campaign Management interface. At the top, there's a navigation bar with icons for Home, Campaign Management, Leads, Customers, and Reports. The main area is titled "Lead Status" and displays a bar chart showing the count of leads across five categories: New (22), Contacted (16), Completed (14), Accepted (14), and Client Rejected (0). Below the chart is a legend: Credit Card for young professional (red), SBI CAMPAIGN DEMO (purple), and Sep Camp 1 (green). A search bar at the bottom allows users to search based on Campaign Name & ID.

Search based on Campaign Name & ID

2019090839 - CAMP2801

% Lead status by campaign

Status	Campaign	Count
New	SBI CAMPAIGN DEMO	22
New	Sep Camp 1	2
Accepted	SBI CAMPAIGN DEMO	14
Accepted	Sep Camp 1	0
Completed	SBI CAMPAIGN DEMO	14
Completed	Sep Camp 1	0
Contacted	SBI CAMPAIGN DEMO	16
Contacted	Sep Camp 1	0
In Progress	SBI CAMPAIGN DEMO	0
In Progress	Sep Camp 1	0
Ready for Follow-up	SBI CAMPAIGN DEMO	2
Ready for Follow-up	Sep Camp 1	0
Client Rejected	SBI CAMPAIGN DEMO	0
Client Rejected	Sep Camp 1	0

% Lead status by channel

Channel	Campaign	Count
Corporate Centre	SBI CAMPAIGN DEMO	14
Corporate Centre	Sep Camp 1	0
Kolkata LHO	SBI CAMPAIGN DEMO	0
Kolkata LHO	Sep Camp 1	0
Guwahati (North East)	SBI CAMPAIGN DEMO	0
Guwahati (North East)	Sep Camp 1	0
Bengaluru	SBI CAMPAIGN DEMO	0
Bengaluru	Sep Camp 1	0
Thiruvananthapuram	SBI CAMPAIGN DEMO	0
Thiruvananthapuram	Sep Camp 1	0
CAG Central	SBI CAMPAIGN DEMO	0
CAG Central	Sep Camp 1	0
Commercial Client Group (CCG)	SBI CAMPAIGN DEMO	0
Commercial Client Group (CCG)	Sep Camp 1	0
Sam Group	SBI CAMPAIGN DEMO	0
Sam Group	Sep Camp 1	0
CAO-1 Kolkata	SBI CAMPAIGN DEMO	0
CAO-1 Kolkata	Sep Camp 1	0
Maharashtra	SBI CAMPAIGN DEMO	0
Maharashtra	Sep Camp 1	0
CAOU-II, Mumbai (Kolkata)	SBI CAMPAIGN DEMO	0
CAOU-II, Mumbai (Kolkata)	Sep Camp 1	0

Screen: Filter and Three Dots

This screenshot shows the same SBI Wealth interface as above, but with a "Circle" button highlighted in the top right corner of the Lead Status section. A detailed dropdown menu is open, listing various geographical regions and offices for filtering. The menu includes options like Corporate Centre, Kolkata LHO, Guwahati (North East), Bengaluru, Thiruvananthapuram, CAG Central, Commercial Client Group (CCG), Sam Group, CAO-1 Kolkata, Maharashtra, and CAOU-II, Mumbai (Kolkata).

Search based on Campaign Name & ID

2019090839 - CAMP2801

% Lead status by campaign

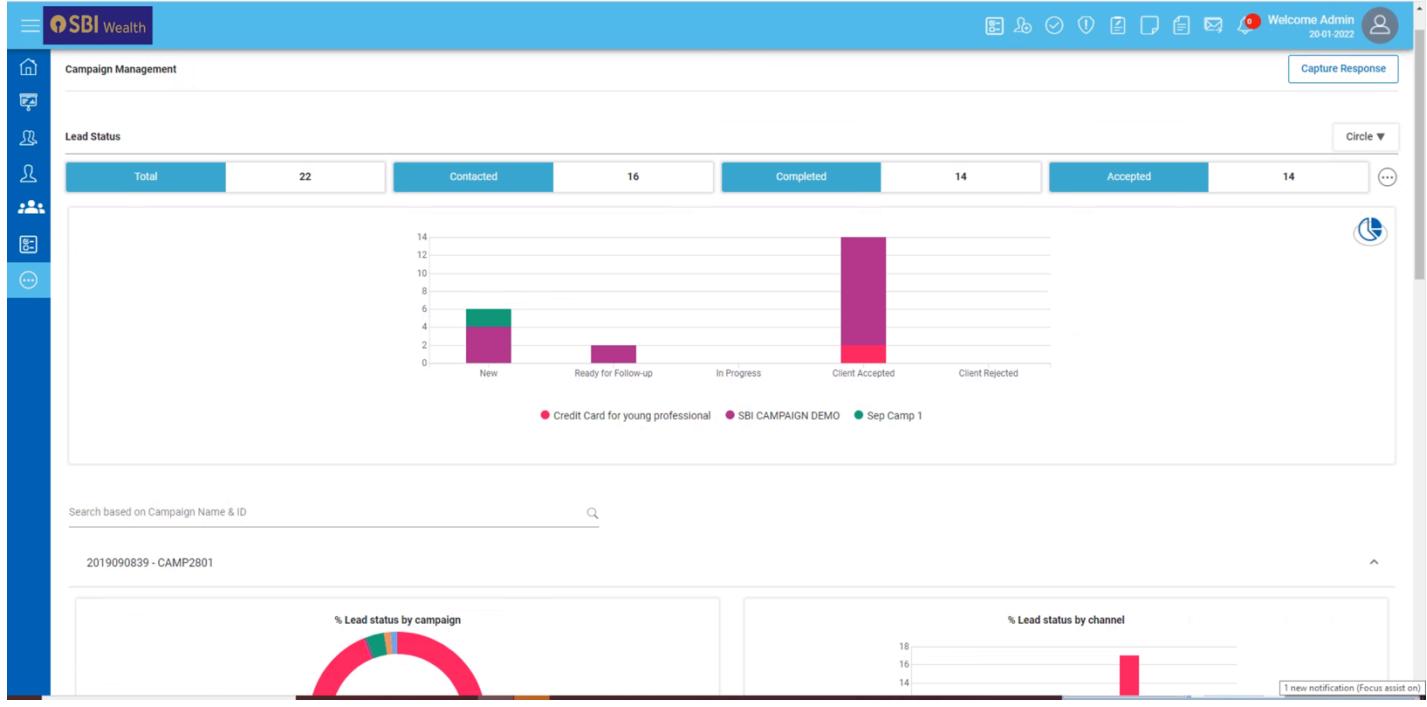
Status	Campaign	Count
New	SBI CAMPAIGN DEMO	22
New	Sep Camp 1	2
Accepted	SBI CAMPAIGN DEMO	14
Accepted	Sep Camp 1	0
Completed	SBI CAMPAIGN DEMO	14
Completed	Sep Camp 1	0
Contacted	SBI CAMPAIGN DEMO	16
Contacted	Sep Camp 1	0
In Progress	SBI CAMPAIGN DEMO	0
In Progress	Sep Camp 1	0
Ready for Follow-up	SBI CAMPAIGN DEMO	2
Ready for Follow-up	Sep Camp 1	0
Client Rejected	SBI CAMPAIGN DEMO	0
Client Rejected	Sep Camp 1	0

% Lead status by channel

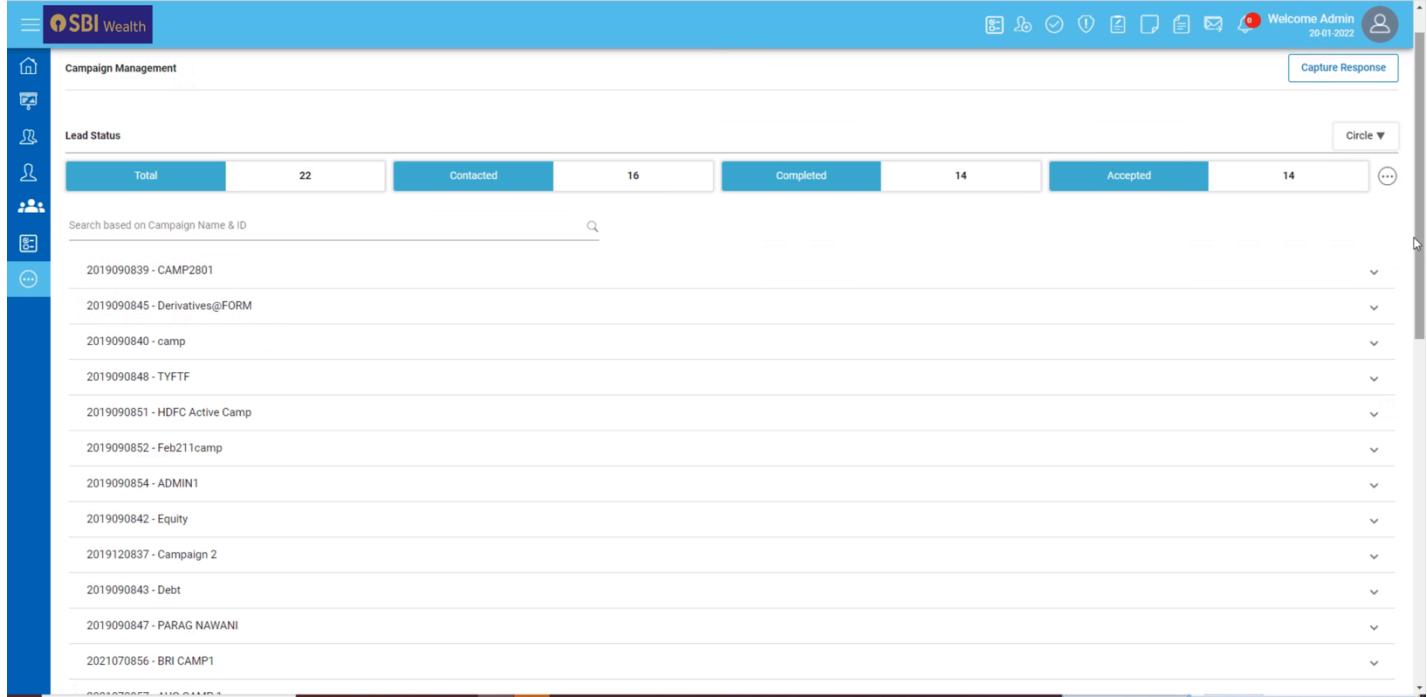
Channel	Campaign	Count
Corporate Centre	SBI CAMPAIGN DEMO	14
Corporate Centre	Sep Camp 1	0
Kolkata LHO	SBI CAMPAIGN DEMO	0
Kolkata LHO	Sep Camp 1	0
Guwahati (North East)	SBI CAMPAIGN DEMO	0
Guwahati (North East)	Sep Camp 1	0
Bengaluru	SBI CAMPAIGN DEMO	0
Bengaluru	Sep Camp 1	0
Thiruvananthapuram	SBI CAMPAIGN DEMO	0
Thiruvananthapuram	Sep Camp 1	0
CAG Central	SBI CAMPAIGN DEMO	0
CAG Central	Sep Camp 1	0
Commercial Client Group (CCG)	SBI CAMPAIGN DEMO	0
Commercial Client Group (CCG)	Sep Camp 1	0
Sam Group	SBI CAMPAIGN DEMO	0
Sam Group	Sep Camp 1	0
CAO-1 Kolkata	SBI CAMPAIGN DEMO	0
CAO-1 Kolkata	Sep Camp 1	0
Maharashtra	SBI CAMPAIGN DEMO	0
Maharashtra	Sep Camp 1	0
CAOU-II, Mumbai (Kolkata)	SBI CAMPAIGN DEMO	0
CAOU-II, Mumbai (Kolkata)	Sep Camp 1	0

Screen: Select Region 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

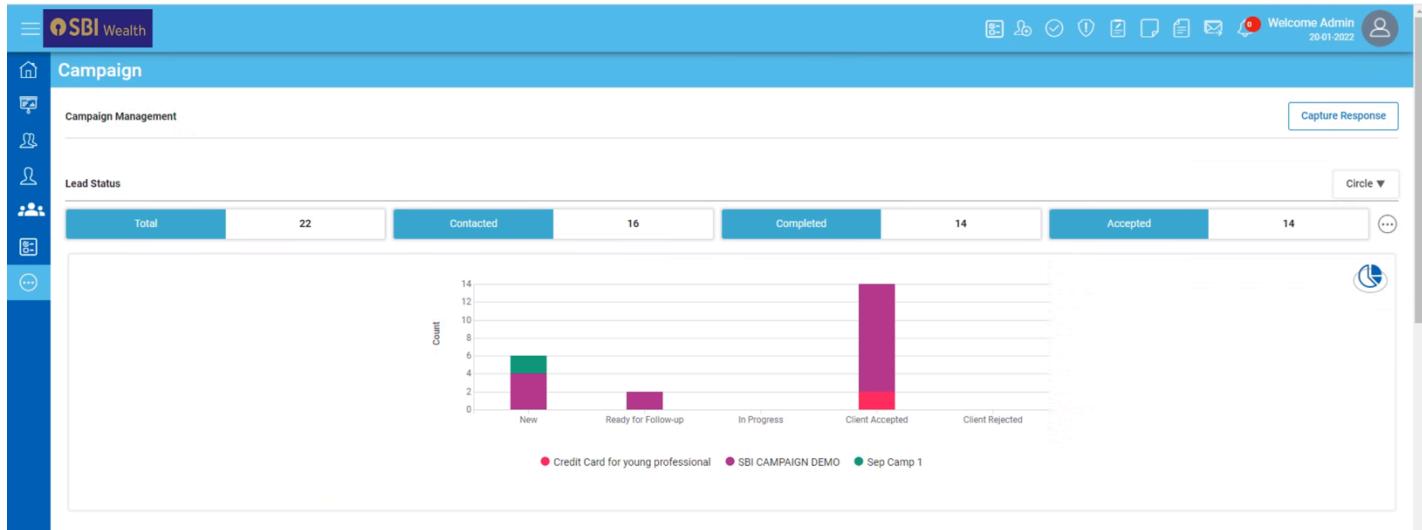


Screen: Three Dots – Expanded View

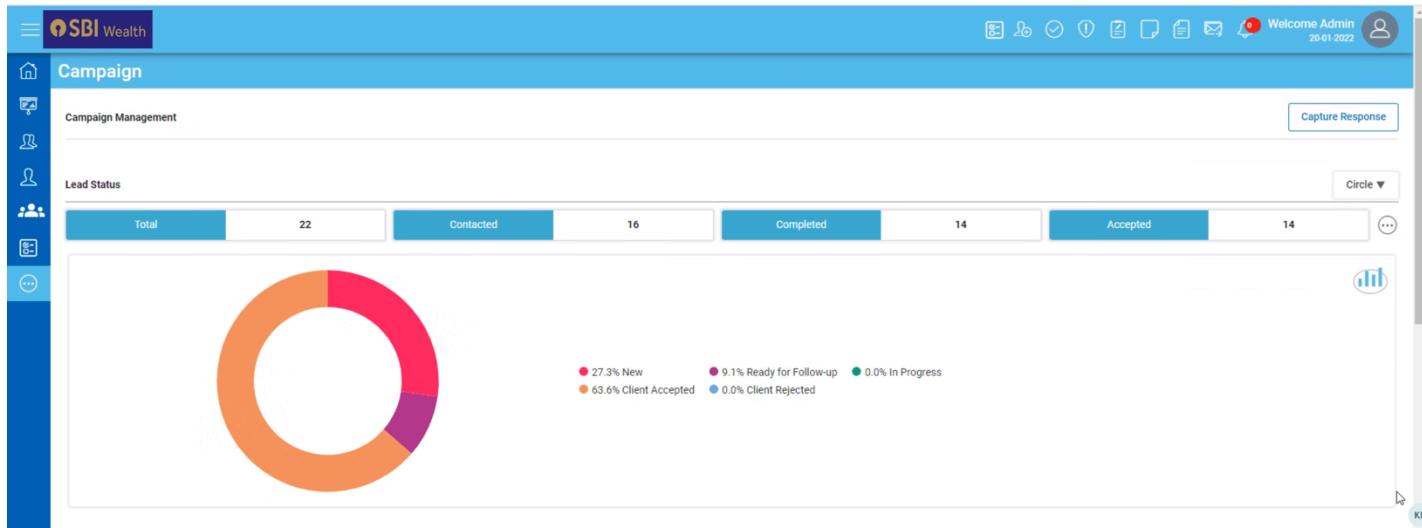


Screen: Collapsed Graphs

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



Screen: Column Chart View



Screen: Pie Chart View

5. 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

The screenshot shows a dashboard for SBI Wealth. At the top, there's a navigation bar with icons for home, user profile, and other system functions. The main area features a bar chart titled 'Count' showing the number of leads in different stages: New (~650), Ready for Follow-up (~10), In Progress (~5), Client Accepted (~5), and Client Rejected (~5). Below the chart is a legend listing various campaign names. A red box highlights a search bar labeled 'Search based on Campaign Name & ID'. Below the search bar is a dropdown menu showing a list of campaign entries:

- 2019090839 - CAMP2801
- 2019090845 - Derivatives@FORM
- 2019090840 - camp
- 2019090848 - TYFTF
- 2019090851 - HDFC Active Camp

Screen: Search for a Campaign

- The “Lead status by campaign” and Lead status by channel” is displayed to the user. Leads who are followed up by the RM (RM updates the lead response status – refer to section 4.3.9 Capture Responses) would be tracked under the “RM Follow up” channel. Leads for whom the response status is received through campaign communication channels (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 4.2.2 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 section 8 Annexure for Campaign Response Upload Template)

The screenshot shows a reporting interface for SBI Wealth. At the top, there's a navigation bar with icons for home, user profile, and other system functions. The main area displays two charts. On the left is a donut chart titled '% Lead status by campaign' with the following data:

Status	Percentage
New	86.1%
Ready For Follow-Up	2.8%
In Progress	2.8%
Client Accepted	5.6%
Client Rejected	2.8%

On the right is a bar chart titled '% Lead status by channel' with the following data:

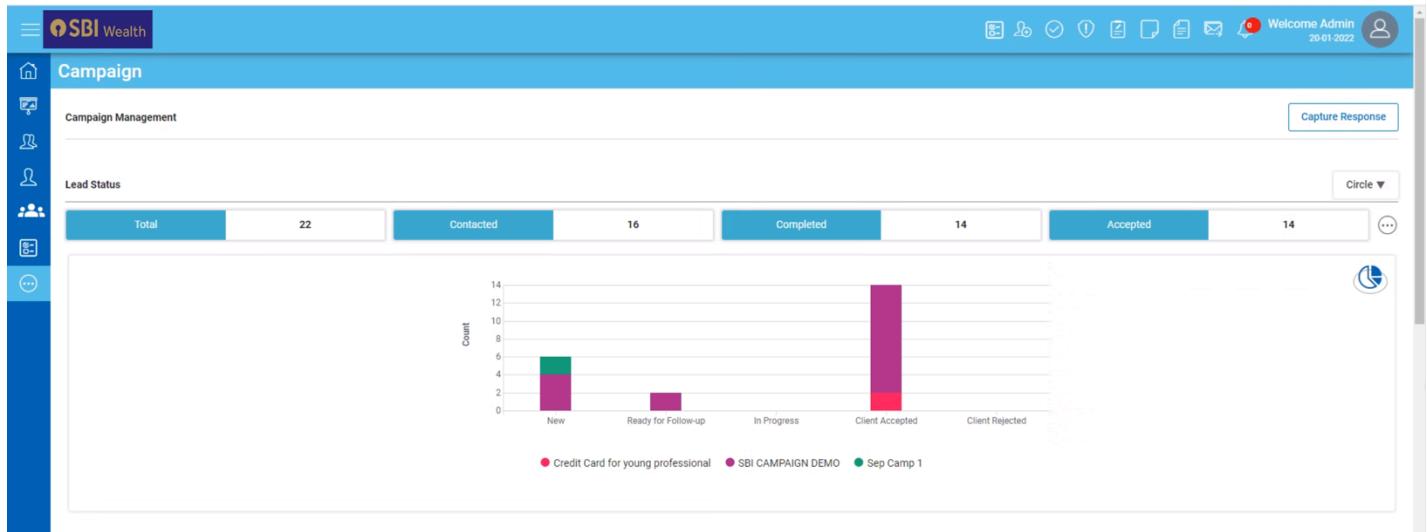
Channel	Percentage
Client Accepted	2
Client Rejected	1
Expired	0
In Progress	1
Ready for Follow-up	1

Legend for the charts:

- RM Follow up (Red)
- SMS-2 Way and Email (Purple)

4.3.9 Capture Responses

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

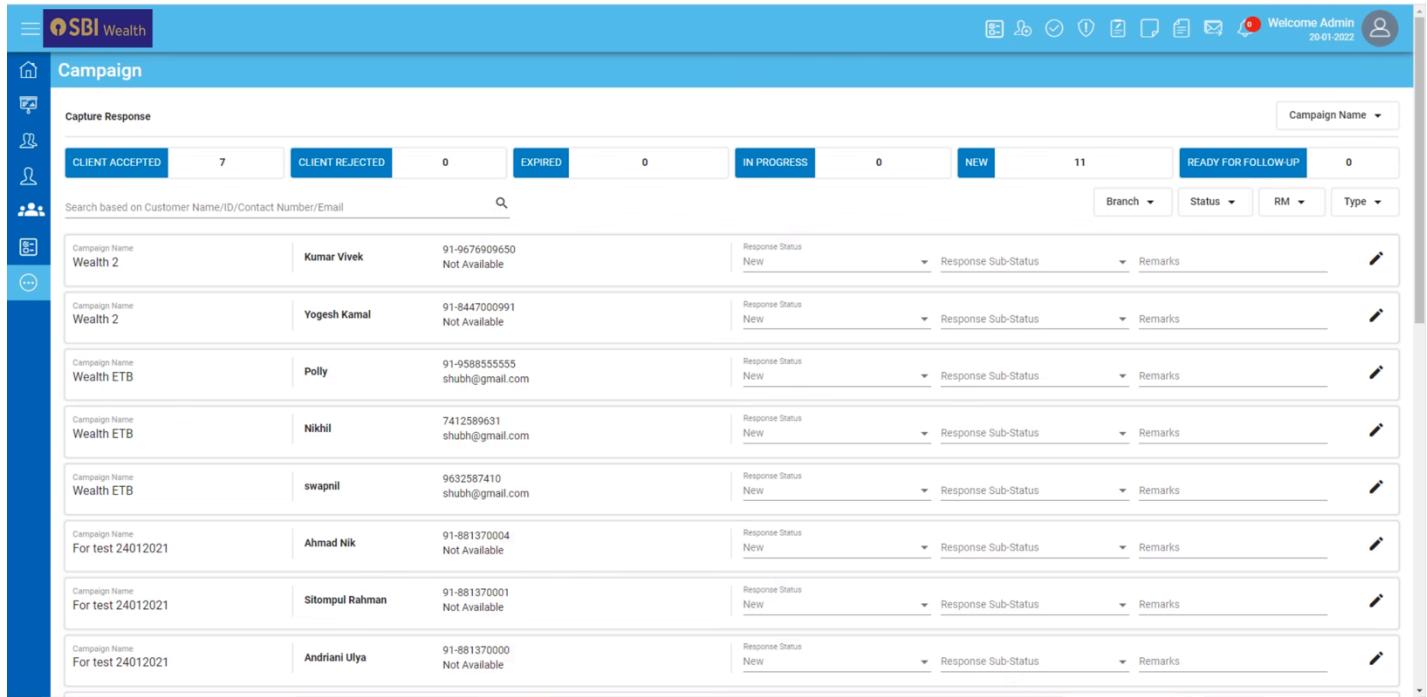


Screen: Navigating to the Capture Response screen

- After navigating to the Capture Response screen, the User can use the following filters available to help them capture Lead responses:
 - Campaign Name - Filter by Campaign Name
 - Branch - Filter by Branch
 - Sub-Status - Filter by Lead Sub Status based on the Lead Status such as Call Back, Uncontactable – Max Attempt etc.
 - Status - Filter by Lead Status such as New, Ready for Follow Up, In Progress, Client Accepted, and Client Rejected
 - RM - Filter by RM
 - Type - Filter by Type for Lead and CIF (If the Lead is existing wealth customer)
- The User can search for a Lead by entering anyone of the following:
 - Customer Name
 - Customer ID
 - Contact Number
 - Email
- After searching/navigating to the Lead, the User can capture the following details for the Lead:
 - Response Status – Response statuses available are New, Ready for Follow Up, In Progress, Client Accepted, and Client Rejected
 - 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 section 4.3.7 View Campaign Dashboard)



The screenshot shows the 'Capture Response' section of the SBI Wealth Campaign dashboard. At the top, there are six status categories with counts: CLIENT ACCEPTED (7), CLIENT REJECTED (0), EXPIRED (0), IN PROGRESS (0), NEW (11), and READY FOR FOLLOW-UP (0). Below this is a search bar and a dropdown menu for filtering by Branch, Status, RM, and Type. The main area displays a list of leads with their campaign names, names, phone numbers, and email addresses. Each lead entry includes fields for Response Status (New), Response Sub-Status, and Remarks, along with a edit icon.

Campaign Name	Name	Phone Number	Email	Response Status	Response Sub-Status	Remarks
Wealth 2	Kumar Vivek	91-9676909650 Not Available		New		
Wealth 2	Yogesh Kamal	91-8447000991 Not Available		New		
Wealth ETB	Polly	91-9588555555 shubh@gmail.com		New		
Wealth ETB	Nikhil	7412589631 shubh@gmail.com		New		
Wealth ETB	swapnil	9632587410 shubh@gmail.com		New		
For test 24012021	Ahmad Nik	91-881370004 Not Available		New		
For test 24012021	Sitompul Rahman	91-881370001 Not Available		New		
For test 24012021	Andriani Ulya	91-881370000 Not Available		New		

Screen: Capture Response screen

4.3.10 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. On 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, 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 a web-based application for managing meetings. The top navigation bar includes the SBI Wealth logo, a user icon, and a welcome message: "Welcome Winfrid 09-06-2021". Below the header is a sidebar with various icons: Home, Meeting, Relationship, Summary, Action Items, and Contact Details. The main content area is titled "Meeting Information" and contains the following fields:

- Meeting Type*: Lead (dropdown)
- Mode of Meeting* (dropdown)
- Relationship*: Person Met (dropdown)
- Summary Of Discussion* (text area)
- Remarks (text area)
- Summary of Action Items Date: 06-09-2021 (text field)
- Contact Details* (text area)
- Invites
- Attendees*: Winfrid-00203753 (dropdown)
- Optional (dropdown)

At the bottom left is a "Back" button, and at the bottom right is a "Save" button, both highlighted with red boxes.

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	Input	No	String	Yes	Not Applicable	
2	Campaign Type	Displays the Campaign Type	Select	Yes	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	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	No	String	Yes	Not Applicable	
2	Campaign name(local language)	Inputs the Campaign name	Input	Yes	String	No	Not Applicable	
2	Campaign Type	Displays the Campaign Type	Select	Yes	String	Yes	3. Event 4. Normal	
3	Campaign/event ID	Displays the Campaign/event ID. For a new campaign, this field is not editable	Display	No	Numeric	Not Applicable	Not Applicable	
4	Target response rate (%)	Inputs the Target response rate (%)	Input	Yes	Numeric	Yes	0-100	
5	Objective	Inputs the Objective of the campaign	Input	No	String	Yes	Not Applicable	
6	Campaign Channel	Selects the Campaign Channel for broadcasting the campaign	Select	Yes	String	Yes	1. No contact 2. SMS-2 way and Email 3. SMS-2 way 4. SMS-1 way	

		information					5. Email 6. SMS-1 way and Email	
7	Campaign/Event Status	Displays the status of the campaign	Display	No	Character	Not Applicable	1. New 2. Rejected 3. Active 4. Completed	
8	Sub Product	Display the Types of sub products associated with campaign	Select	Yes	String	No	List of sub products	
9	Product Type	Display the Types of products associated with campaign	Select	Yes	String	No	List of products	
10	Product Availability	Displays the availability of campaign product	Select	Yes	String	No	1.Yes 2.No	
11	Product Name	Displays the name of product	Input	Yes	String	No	Not Applicable	
12	Reward For RM	Displays the reward to RM on successfully achieving the campaign targets	Input	Yes	String	No	Not Applicable	
13	Reward for customer	Displays the reward to customer if he/she subscribe to the campaign	Input	Yes	String	No	Not Applicable	
14	Campaign Performance (%)	Displays the campaign performance	Input	Yes	Numeric	Yes	0-100	
15	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	
16	Start Date	Inputs the campaign start date	Input	No	String	Yes	Not Applicable	
17	End date	Inputs the campaign end date	Input	Yes	String	Yes	Not Applicable	
18	Broadcast Date and Time	Display the date and time at which campaign information will be broadcasted	Input	Yes	Numeric	No	Not Applicable	
19	Campaign Period(Days)	Displays the period during which campaign will be active	Display	No	Numeric	Yes	Not Applicable	
20	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	Displays the Currency for the selected cost type	Display	Yes	String	No	IDR	

Campaign Definition – Admin

1	Campaign Manager Name	Selects the Campaign manager name	Select	No	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	No	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 (Existing wealth Customer)	Display	No	String	Not Applicable	1. Lead 2. CIF	

Campaign Definition - Campaign Notes

1	Subject	Inputs the Subject of the email for the campaign	Input	Yes	String	Yes	Not Applicable	
---	---------	--	-------	-----	--------	-----	----------------	--

		communication						
2	Email Body	Inputs the Email Content for the campaign communication	Input	Yes	String	No	Not Applicable	
3	Signature	Inputs the Signature of the bank	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	Alphanumeric	Yes	Not Applicable	
2	List Name	Displays the Lead List Name	Display	No	Alphanumeric	Yes	Not Applicable	
3	Rule criteria	Displays the Lead Rule criteria of the list	Display	No	Alphanumeric	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	Region	Displays the Region 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	Alphanumeric	Not Applicable	Not Applicable	
3	Criteria	Displays the Criteria definition of the lead rule	Display	No	Alphanumeric	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 Owner ID of user who has created lead rule	Display	No	Alphanumeric	Not Applicable	Not 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	Alphanumeric	Yes	NA	
2	Select Criteria	Selects the criteria for the lead rule	Select	Yes	String	Yes	Segment Differently Abled Person ISA Form Client category Tax Status Wealth Hub Total AUM/ Credit Global Equity Holdings Regional Equity holdings LOANSHOLDING Alternative Holdings Cash & Equity Holdings Fixed Income Holdings Local Equity Holdings Currency Global Equity Last purchase Regional Equity Last purchase Loans Last purchase Alternative Last purchase	

							Cash & Equity Last purchase Fixed Income Last purchase Local Equity Last purchase No. of Product Type Holdings Product Name Current Age Birthday Gender Citizenship Last Contacted Risk Appetite Marital Status No. of dependents CIS creation date Branch City/Town State Postcode Employer Customer Category Type of Business Unit Deposits Holding Investment Holding Insurance Holding Loan Holding Current account Holding Savings account Holding Fixed deposit Account Holding Mutual Fund Holding Bonds Holding Equity Holding Structured investment Holding Car insurance Holding Personal insurance Holding Life Insurance Holding Property Insurance Holding Property loan Holding Overdraft/personal loan Life Insurance Last Purchase Property Insurance Last Purchase Property loan Last Purchase	
--	--	--	--	--	--	--	---	--

							Personal loan Last Purchase Cash plus Personal Loan Last Purchase	
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	This 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 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"	Display	No	Numeric	Not Applicable	Not Applicable	
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 circles 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	Displays the	Display	No	Numeric	Not	Not Applicable	

	Follow	number of leads with Response Status : Ready for Follow Up				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	
6	Expired	Displays the number of leads expired	Display	No	Numeric	Not Applicable	Not Applicable	

Lead Response - Search and Filter

7	Search Based on customer name/ID/Contact Number/Email	Search Based on Lead name/ID/Contact Number/Email	Input	Yes	Character	No	Not Applicable	
8	Clear	Clears the filters applied	Clear	Not Applicable	Character	Not Applicable	Not Applicable	
9	Branch	Filters the leads for the selected branch	Select	Yes	Character	No	List of Branches	
10	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	
11	RM	Filters the leads for the selected RM	Select	Yes	Character	No	List of RMs	
12	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	Display	No	Character	Not		

		Name				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	Input	Yes	String	No	1. Client Abroad, Email Taken 2. Conference Call 3. Not Contactable 4. Not Interested In Bank Services	
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	Display	No	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	Input	Yes	String	No	1. Happy 2. Irate 3. Satisfied 4. Sensitive 5. Ultra-sensitive	

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 Off Shore 4. Others 5. Telephone 6. Telephone Off Shore 7. Video Conference 8. Video Conference Off Shore	
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 met the lead	Input	Yes	Character	No	Not Applicable	
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	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 (only xls attachments are allowed)



Lead Upload
Template.xls

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



Campaign
Management-Lead Re

9. Glossary

1. For the Flow Diagram
 - a. L1 - This depicts the information exchange with the external systems to achieve the intent
 - b. L2 - This diagram depicts the positive flow through the various processing stations

- c. L3 - This diagram depicts the positive flow through the various processing stations along with the capability /action buttons
 - d. L4 - This diagram depicts the positive and negative flow through the various processing stations along with the capability/action buttons and back button flows
2. The terms RM Office and PMS refer to the same application and have been used interchangeably throughout this document

10. Addendum

10.1. Change Requirement

In the Base Product, Lead Response Upload template is used for uploading the bulk responses received via Email/SMS channel. Current Upload template has a Lead ID column which needs to be entered manually by the user. There should be provision of having the lead ID auto filled in the template for SBI to eliminate the manual process for the user to individually identify and type the lead ids in the response capture upload template.

To address this problem, users can download the Lead Monitoring report which comes with Lead ID. Users can then update the lead response and upload the same file to update the campaign response.

10.2. PDA Reference Number

Day 1 – 13/Sep/21 – S.No.1

10.3. Business Benefit

This change is required to eliminate the manual process for the user to individually identify and type the lead ids in the response capture upload template

10.4. Impact Analysis

10.4.1. Impact of not making the change

User experience, in the current process, the user has to individually identify the leads for which response is received and type in the upload file. This may lead to errors in the records uploaded

10.4.2. Impacted Areas

10.4.2.1. Internal Systems

S.No	Module	Functionality	Description
1	PMS	Campaign Dashboard	
2	CRM	Reports – Lead Monitoring Report	Addition of mobile no and Email ID
3	CRM	Campaign Response Upload	

10.4.2.2. External Systems

None

10.5. Solution

- 10.5.1. User needs to login to the application and navigate to the Customer Profile Desk.
- 10.5.2. Users can hover over the “View” and click on “Reports”.

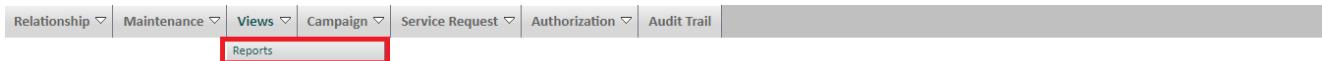


Figure: CRM landing page

- 10.5.3. Click on Report Type Drop down and select campaign Management.
- 10.5.4. Select Lead Monitoring Report from drop down list.

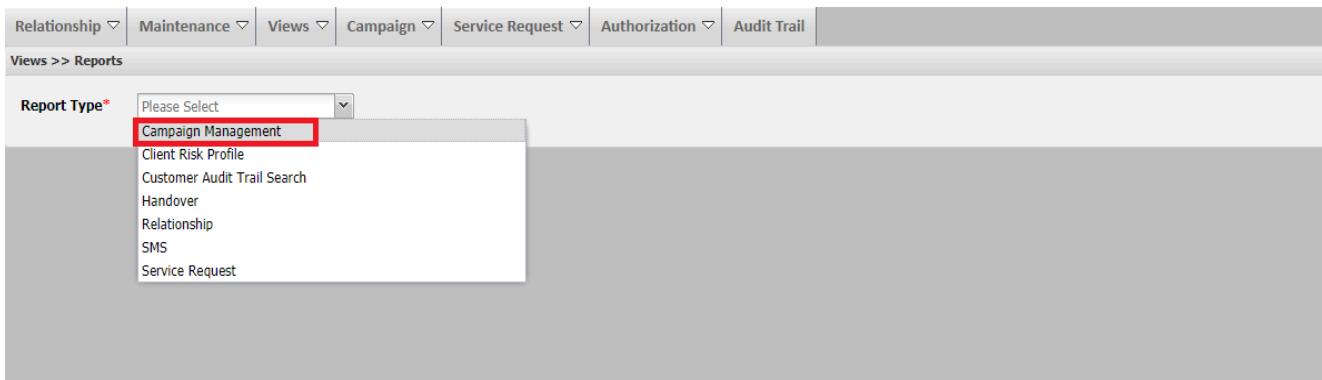


Figure: Report Screen

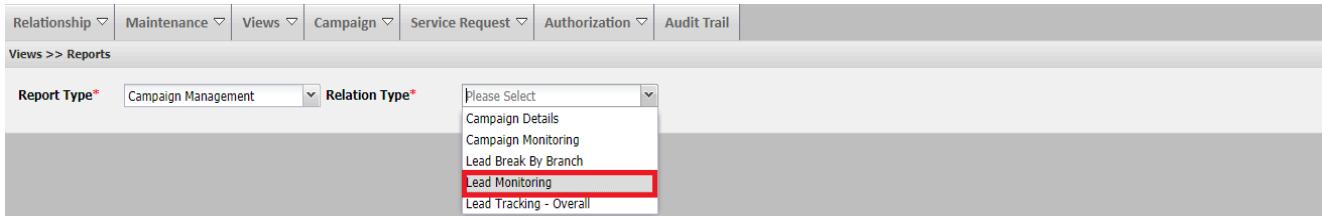
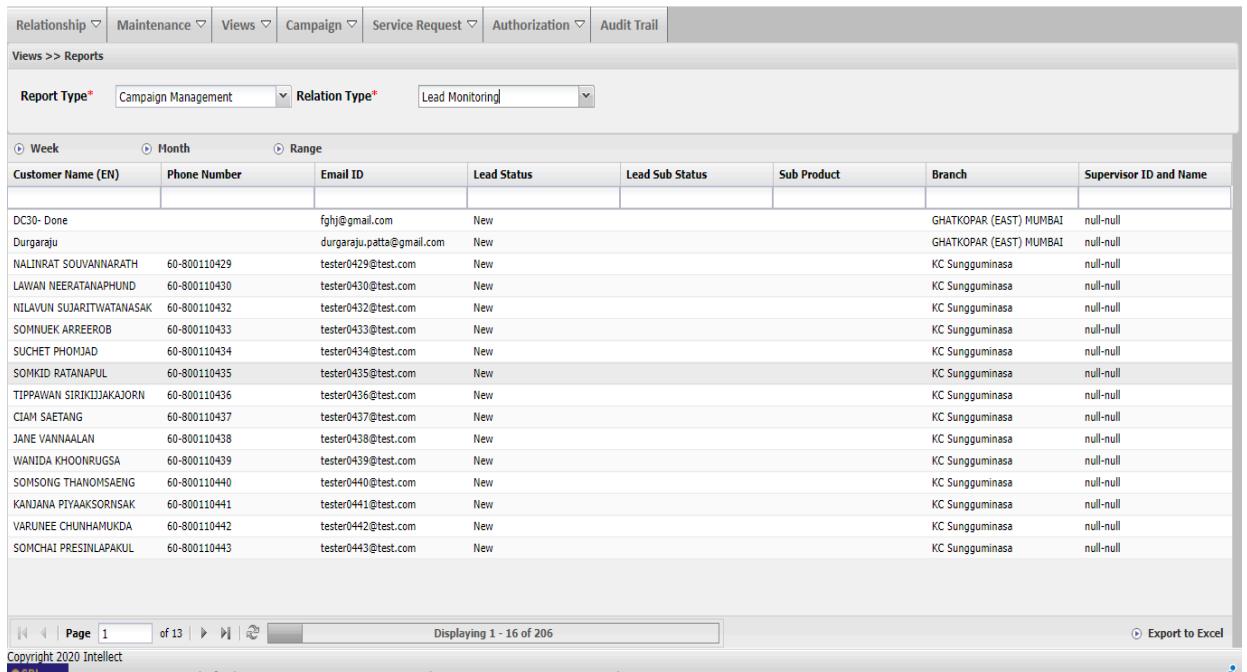


Figure: Lead Monitoring

- 10.5.5. Once the “Lead Monitoring” page loads up, click on “Export to Excel” button to download the format. This format will include Lead ID and other details like Mobile No, Email Id, Customer Name, Lead Status etc.



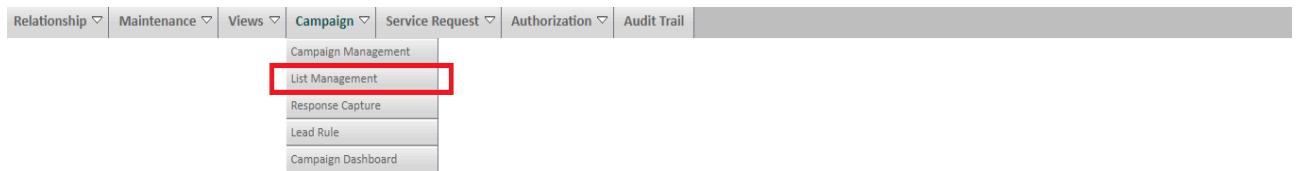
The screenshot shows a report titled "Views >> Reports" with "Report Type*" set to "Campaign Management" and "Relation Type*" set to "Lead Monitoring". The data grid has several columns: Customer Name (EN), Phone Number, Email ID, Lead Status, Lead Sub Status, Sub Product, Branch, and Supervisor ID and Name. The "Lead Status" column is highlighted with a red box.

Customer Name (EN)	Phone Number	Email ID	Lead Status	Lead Sub Status	Sub Product	Branch	Supervisor ID and Name
DC30- Done		fghj@gmail.com	New			GHATKOPAR (EAST) MUMBAI	null-null
Durgaraju		durgaraju.patta@gmail.com	New			GHATKOPAR (EAST) MUMBAI	null-null
NALINRAT SOUVANNARATH	60-800110429	tester0429@test.com	New			KC Sunguminasa	null-null
LAWAN NEERATANAPHUND	60-800110430	tester0430@test.com	New			KC Sunguminasa	null-null
NILAVUN SUJARITWATANASAK	60-800110432	tester0432@test.com	New			KC Sunguminasa	null-null
SOMNUEK ARREEROB	60-800110433	tester0433@test.com	New			KC Sunguminasa	null-null
SUCHET PHOMAD	60-800110434	tester0434@test.com	New			KC Sunguminasa	null-null
SOKKID RATANAPUL	60-800110435	tester0435@test.com	New			KC Sunguminasa	null-null
TIPAWAN SIRIKIJAKAJORN	60-800110436	tester0436@test.com	New			KC Sunguminasa	null-null
CIAM SAETANG	60-800110437	tester0437@test.com	New			KC Sunguminasa	null-null
JANE VANNALAN	60-800110438	tester0438@test.com	New			KC Sunguminasa	null-null
WANIDA KHOONRUGSA	60-800110439	tester0439@test.com	New			KC Sunguminasa	null-null
SOMSONG THANOMSAENG	60-800110440	tester0440@test.com	New			KC Sunguminasa	null-null
KANJANA PIYAKSORNSAK	60-800110441	tester0441@test.com	New			KC Sunguminasa	null-null
VARUNEE CHUNHAMUKDA	60-800110442	tester0442@test.com	New			KC Sunguminasa	null-null
SOMCHAI PRESINLAPAKUL	60-800110443	tester0443@test.com	New			KC Sunguminasa	null-null

Page 1 of 13 | Displaying 1 - 16 of 206 | Export to Excel

Figure: Lead Monitoring Page

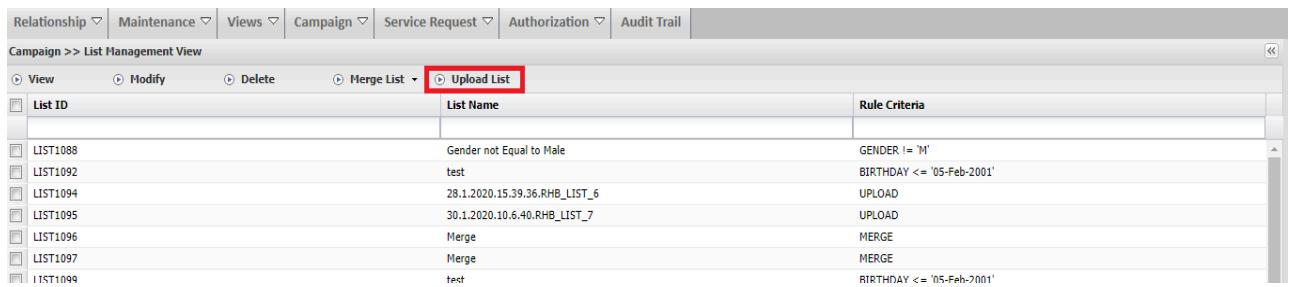
- 10.5.6. Once the responses in column Lead status are updated in the sheet, User needs to navigate to Customer Profile Desk and select the menu "List Management" under campaign.



The screenshot shows a navigation bar with "Campaign" selected. Below it is a dropdown menu with four items: "Campaign Management", "List Management" (which is highlighted with a red box), "Response Capture", and "Lead Rule".

Figure: List Management

- 10.5.7. Once the page loads up, select Upload List.



The screenshot shows a "Campaign >> List Management View" page. At the top, there is a toolbar with buttons for View, Modify, Delete, Merge List, and Upload List (which is highlighted with a red box). Below the toolbar is a table with three columns: List ID, List Name, and Rule Criteria. The table contains several rows of data, each with a checkbox next to the List ID and a detailed description in the other columns.

List ID	List Name	Rule Criteria
LIST1088	Gender not Equal to Male	GENDER != 'M'
LIST1092	test	BIRTHDAY <= '05-Feb-2001'
LIST1094	28.1.2020.15.39.36.RHB_LIST_6	UPLOAD
LIST1095	30.1.2020.10.6.40.RHB_LIST_7	UPLOAD
LIST1096	Merge	MERGE
LIST1097	Merge	MERGE
LIST1099	test	BIRTHDAY <= '05-Feb-2001'

Figure: List Management

- 10.5.8. Select Campaign response from the drop down list and browse for the response upload file. Click on upload button to upload the list.
 10.5.9. Once the upload file is processed, system will display a prompt for successful upload.

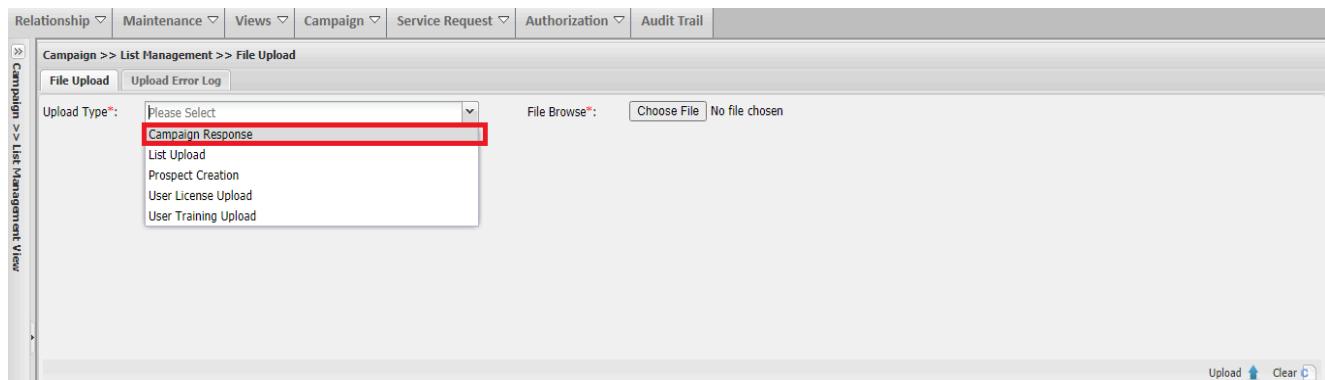
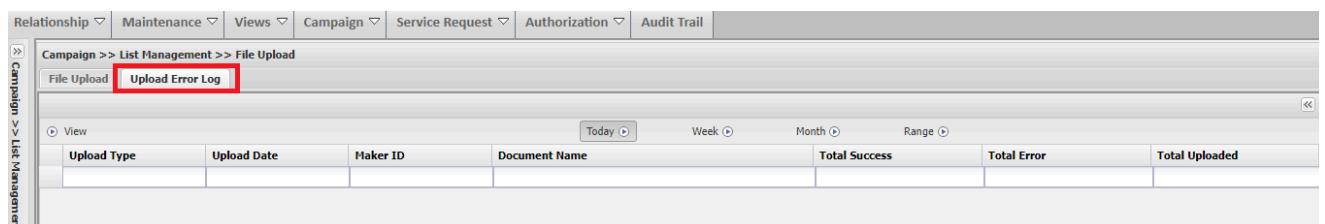


Figure: Upload Screen

- 10.5.10. After the upload, the system displays the result of the same in Upload Log. User clicks on “Upload Error Log” for viewing the result of the upload



Screen: Upload Error Log Navigation

- 10.5.11. 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. System allows to filter the records based on uploads done today, week, month and date range

Upload Type	Upload Date	Maker ID	Document Name	Total Success	Total Error	Total Uploaded
List Upload	10-Aug-2020	SUPADM1	8.8.2020.12.59.0.Campaign1.csv	2	0	2
List Upload	10-Aug-2020	SUPADM1	5.8.2020.14.0.58.Campaign111.csv	112	0	112
List Upload	10-Aug-2020	SUPADM1	8.8.2020.12.55.0.Campaign112.csv	0	100	100
List Upload	10-Aug-2020	SUPADM1	4.8.2020.11.37.38.Campaign111.csv	0	112	112
List Upload	10-Aug-2020	SUPADM1	4.8.2020.12.23.25.Campaign111.csv	0	112	112
List Upload	10-Aug-2020	SUPADM1	4.8.2020.12.42.24.Campaign111.csv	0	112	112
List Upload	10-Aug-2020	SUPADM1	4.8.2020.12.46.55.Campaign111.csv	112	0	112
List Upload	10-Aug-2020	SUPADM1	8.8.2020.12.22.57.Campaign113.csv	0	62	62
List Upload	10-Aug-2020	SUPADM1	8.8.2020.12.24.14.Campaign111.csv	112	0	112
List Upload	10-Aug-2020	SUPADM1	10.8.2020.1.0.49.CoreBankingCustomer1008.csv	3	0	3
List Upload	10-Aug-2020	SUPADM1	8.8.2020.11.28.0.Core_Customers_ms_Prospets_1.csv	0	2	2
Prospect Creation	10-Aug-2020	SYSTEM	10.8.2020.0.52.9.Core_Customers1.csv	2	0	2
Prospect Creation	10-Aug-2020	SYSTEM	4.8.2020.11.48.1.PROSPECT_UPLOAD.csv	2	0	2
Prospect Creation	10-Aug-2020	SYSTEM	3.8.2020.11.12.33.Prospectupload1.csv	0	15	15
Prospect Creation	10-Aug-2020	SYSTEM	3.8.2020.11.17.31.Prospectupload1.csv	15	0	15
Prospect Creation	10-Aug-2020	SYSTEM	4.8.2020.11.44.39.PROSPECT_UPLOAD.csv	0	2	2
Prospect Creation	10-Aug-2020	SYSTEM	4.8.2020.15.30.29.Prospectupload1.csv	13	2	15

Screen: Upload Error Log Summary

- 10.5.12. The user can search the file name, selects the record and clicks on “View” to view the detailed summary of the upload result

Screenshot of the Intellect software interface showing the 'Campaign >> List Management >> File Upload' screen. A red box highlights the 'View' button in the toolbar. Below it, a table lists file uploads. A red box highlights the 'List Upload' row for 'CoreBan'. The table columns include Upload Type, Upload Date, Maker ID, Document Name, Total Success, Total Error, and Total Uploaded.

Upload Type	Upload Date	Maker ID	Document Name	Total Success	Total Error	Total Uploaded
List Upload	10-Aug-2020	SUPADM1	10.8.2020.1.0.49.CoreBankingCustomer1008.csv	3	0	3

Screen: Select Error Log Record for View

- 10.5.13. User views the detailed log summary of the uploaded file. The user can further drill down to the record level and check the status (Success/Error) displayed against each record

Screenshot of the Intellect software interface showing the 'Campaign >> List Management >> Upload Error Log >> View' screen. A red box highlights the 'View' link in the navigation bar. The table shows error logs for 'File Name : 5.8.2020.14.0.58.Campaign111.csv'. A red box highlights the 'Failure (0)' link. The table columns include Upload Status, Legal Entity, Customer Name(English), Customer Name(Thai), Owner RM, Primary Contact No, Email, Branch, Segment, Cust ID, ID Type, ID No, and AUM.

Failure (0)	

Screen: View Error Log Detailed Summary

- 10.5.14. The user 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 "Download" button

Screenshot of the Intellect software interface showing the 'Campaign >> List Management >> Upload Error Log >> View' screen. A red box highlights the 'View' link in the navigation bar. The table shows error logs for 'File Name : 8.8.2020.12.22.57.Campaign113.csv'. A red box highlights the 'Failure (62)' link. A red box highlights the 'Error Message' button, which opens a modal dialog showing a table of error details. The table columns in the dialog are S.No, Category, and Field / Error Message.

Failure (62)	

Screen: View Error Record with Error Details

10.5.15. 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 successfully uploaded can be viewed in the List Management screen

10.6. Annexure



Campaign
Management-Lead Re