Requirements

1. The system shall integrate with Core Banking Application to spool and display via a dashboard the customer's full portfolio (name, age, current product in use, address, etc.)

2. The system shall be able to link all contact numbers i.e. Ei-Line, CUG Line

3. The system shall be able to integrate all channels of communication i.e. social media, emails, web, live help chat, etc.

4. The system shall be able to perform self-services.

5. The system shall be able to show and add to products subscribed to by customers.

6. The system shall integrate with our already existing CCMS portal

7. The system shall integrate to the Bank's website wherein customers can reach the contact centre for complaints, requests and have reference number generated.

8. The solution shall have automatic time and date stamping for all interactions and notes

9. The solution shall have the ability to search Contacts, Notes, Email, call, and contact history

10. The system shall be able to create tickets, record all customer interactions and search through tickets using the following parameters (title, user, department, unit, from, to, agent that handled the call or inquiry, priority and status)

11. The system shall be able to search and sort for customers based on their categories (e.g. HNI, Gender, Religion, etc.)

12. Customers shall be able to track their cases online

13. The system shall be able to capture Unity Bank mentions on social media

14. The system shall have SLA definitions to determine how long an issue must be resolved before it is escalated and reminders to aid adherence to SLAs

15. The system shall be able to create customers not already registered on CRM

16. The system shall be able to assign and reassign tasks or generate tasks automatically based on business rules

17. The system shall be able to escalate tasks both manually and automatically (Workflow)

18. The system shall be able to send alerts/notifications to users

19. The system shall be able to spool interactions based on inbound and outbound

20. The solution shall be able to generate customized reports such as open cases, total cases, closed cases, total tickets created by an agent, as required

21. The solution shall have a Best Practice knowledge Base so that agents can access Self-Help documents and How-To Guides

22. The solution shall have the ability to create customized fields and objects

23. The solutions shall be able to assign tasks to individuals and groups

24. The system shall be able to carry out surveys via CRM

25. The solution shall have role-based security and permissions

26. The solution can be accessed securely and remotely by authorized users

27. The solution shall have integration with mobile and Wireless Devices for remote approvals and authorizations

28. The solution shall support XML.

29. The solutions shall support shared calendars and what can be viewed can be defined based on roles and permissions

30. The solution shall be able to integrate with Microsoft Office and Systems including ability to import and export CSV files.

31. The solution shall be able to capture leads and assign them to appropriate business segment.

32. The solutions shall be able to execute campaigns, email campaigns, and capture campaign survey metrics.