**CORPORATE CIF ENRICHMENT**

* Invoke the menu – “Enrich Corporate CIF [ECC]
* CIF Subtype – Customer
* Action – saved
* CIF ID – Enter the CIF ID created earlier
* Click on Go
  1. You Can view the different sections of CIF
* Click on **General Details** to view
  + Basic details under basic details click on continue to move to other details
  + Other details, under other select constitution code from the dropdown
  + Click on save and validate
  + Click on continue to the next section to move to **ADDITIONAL DETAILS**
* **Additional Details**
* Click on Reporting and Reference Details
* Sector – Select appropriate value form searcher
* Subsector – Select appropriate value from searcher
* CBK Sector – Select appropriate value from searcher
* CBK Subsector – Select appropriate value from searcher
* Select region the dropdown
* Affiliate to Bank – Select appropriate value from dropdown
* Insider to Bank - Select appropriate value from dropdown
* Click on Background Check Details
* Enter main source of funds
* Enter tax id
* Select tax country from the searcher
* Select tax exempt as N the dropdown
* Click on additional details
* Select owned by foreigner from the dropdown
* Select owned by women from the dropdown
* Select template as Default
* Click on **Save and Validate**
* Click on Next Section to move to **Bank Defined Details**
* **Bank Defined Details**
* Click on Risk Rating and Score Details
* Customer Rating - Select appropriate value from dropdown
* PEP/PEP Associate – Select “N” or appropriate vale from dropdown
* Click on Relationship Manager Details and input from the searcher
* Click on Details for Official Use
* Select status as active
* Select the appropriate assigned priority from the dropdown
* Select the appropriate secondary segment from the searcher
* Click on **Save and Validate**
* Click on Next Section to move to **Preference Details**
* **Preferences Details**
* Click on preference in bank services
* Select the preferred communication channel
* Click on Save and Validate
* Click on Next Section to move to **Financial Details**
* **Financial Details**
* Click on Other details
* Enter average annual income
* Select the appropriate income range from the dropdown
* Select shareholder from the dropdown as N
* Click on Save and Validate
* Click on Next Section to move to **Relationship details**

**Relationship Details**

* Click on other Banking relationship details
* On relationship list click on the editor
* Select on the roles of corporate representative.
* Click on update
* Click on Save and Validate
* Click on View Summary
* Click on submit

**Verification of Corporate CIF**

* Select the Solution as “**CRM**”
* Invoke the menu – **RCCAT** in the menu shortcut bar
* CIF Type – Corporate
* CIF ID – Enter the CIF ID enriched
* Operation – Approve
* Entity Type – Customer
* Click on Search
* You can see the CIF details which needs to be approved
* Click on Approve hyper link under Action
* Select Access Type as Admin
* You will be redirected to CRM Solution
* Click on VIEW CIF DETAILS
* View each section and Click on BACK TO SUMMARY
* Click on Cancel
* Click on VIEW AUDIT TRAIL
* Close the Window
* Select the Decision from dropdown as Approve
* Enter any Remarks
* Click on Submit
* You will get a message< The approval form is submitted successfully. CIF ID: xxxxxxxxxxx>