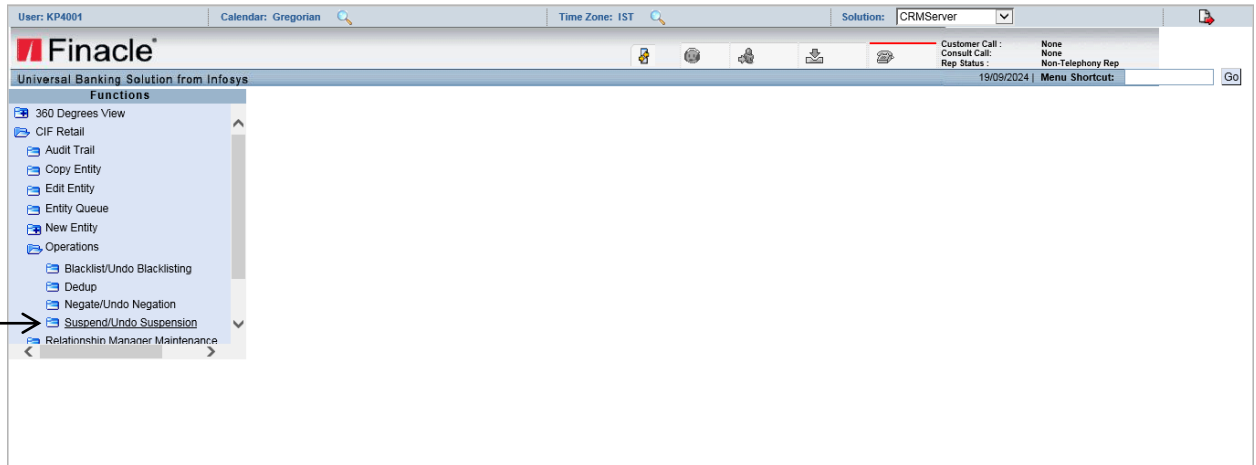


## MARK CIF ID AS SUSPENDED

### 1- RETAIL /CORPORATE ->\_OPERATIONS -> SUSPEND / UNDO SUSPEND



User: KP4001 | Calendar: Gregorian | Time Zone: IST | Solution: CRMServer

Customer Call : None  
Consult Call : None  
Rep Status : Non-Telephony Rep

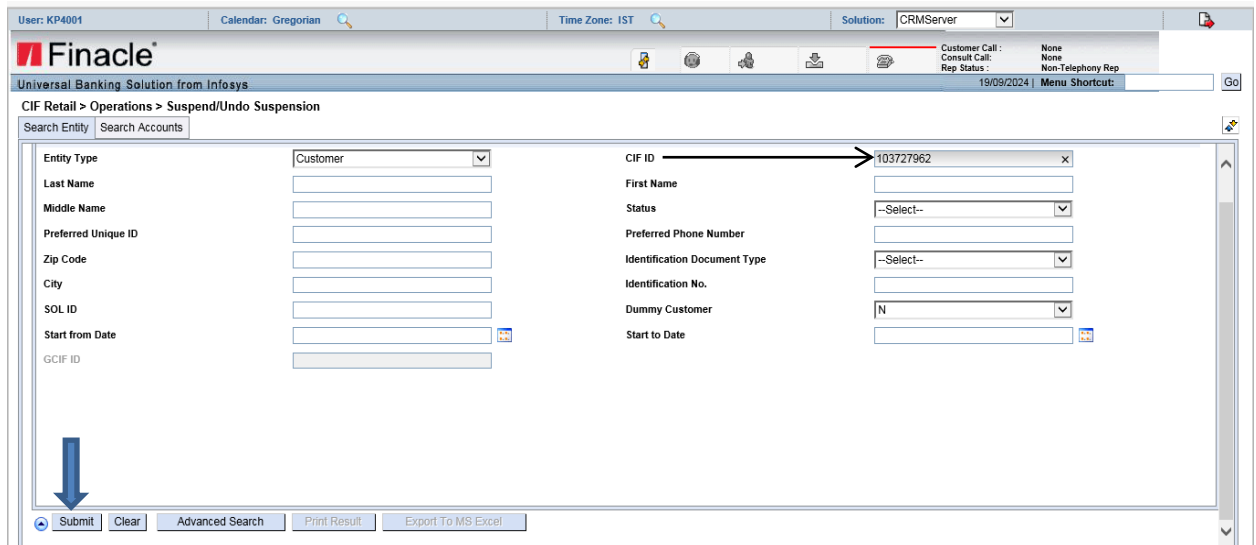
19/09/2024 | Menu Shortcut: [Go]

**Functions**

- 360 Degrees View
- CIF Retail
  - Audit Trail
  - Copy Entity
  - Edit Entity
  - Entity Queue
  - New Entity
  - Operations
    - Blacklist/Undo Blacklisting
    - Dedup
    - Negate/Undo Negation
    - Suspend/Undo Suspension**
    - Relationship Manager Maintenance

### 2- ENTER CIF ID

#### • CLICK ON SUBMIT



User: KP4001 | Calendar: Gregorian | Time Zone: IST | Solution: CRMServer

Customer Call : None  
Consult Call : None  
Rep Status : Non-Telephony Rep

19/09/2024 | Menu Shortcut: [Go]

**CIF Retail > Operations > Suspend/Undo Suspension**

Search Entity | Search Accounts

Entity Type: Customer

CIF ID: 103727962

Last Name: [ ] | First Name: [ ]

Middle Name: [ ] | Status: --Select--

Preferred Unique ID: [ ] | Preferred Phone Number: [ ]

Zip Code: [ ] | Identification Document Type: --Select--

City: [ ] | Identification No.: [ ]

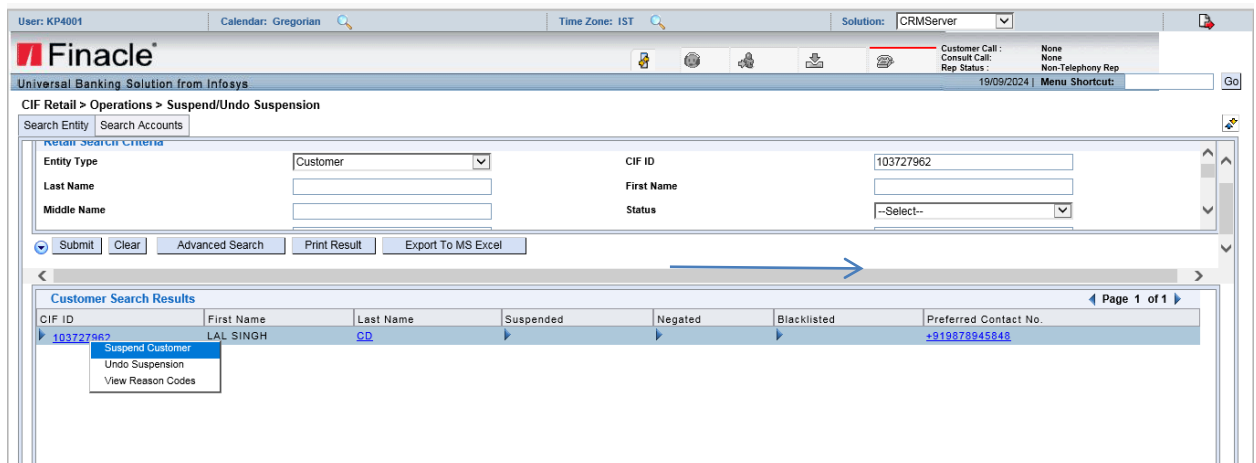
SOL ID: [ ] | Dummy Customer: N

Start from Date: [ ] | Start to Date: [ ]

GCIF ID: [ ]

[Submit] [Clear] [Advanced Search] [Print Result] [Export To MS Excel]

### 3- RIGHT CLICK ON CIF -> SELECT 'SUSPEND CUSTOMER'



User: KP4001 | Calendar: Gregorian | Time Zone: IST | Solution: CRMServer

Customer Call : None  
Consult Call : None  
Rep Status : Non-Telephony Rep

19/09/2024 | Menu Shortcut: [Go]

**CIF Retail > Operations > Suspend/Undo Suspension**

Search Entity | Search Accounts

Entity Type: Customer

CIF ID: 103727962

Last Name: [ ] | First Name: [ ]

Middle Name: [ ] | Status: --Select--

[Submit] [Clear] [Advanced Search] [Print Result] [Export To MS Excel]

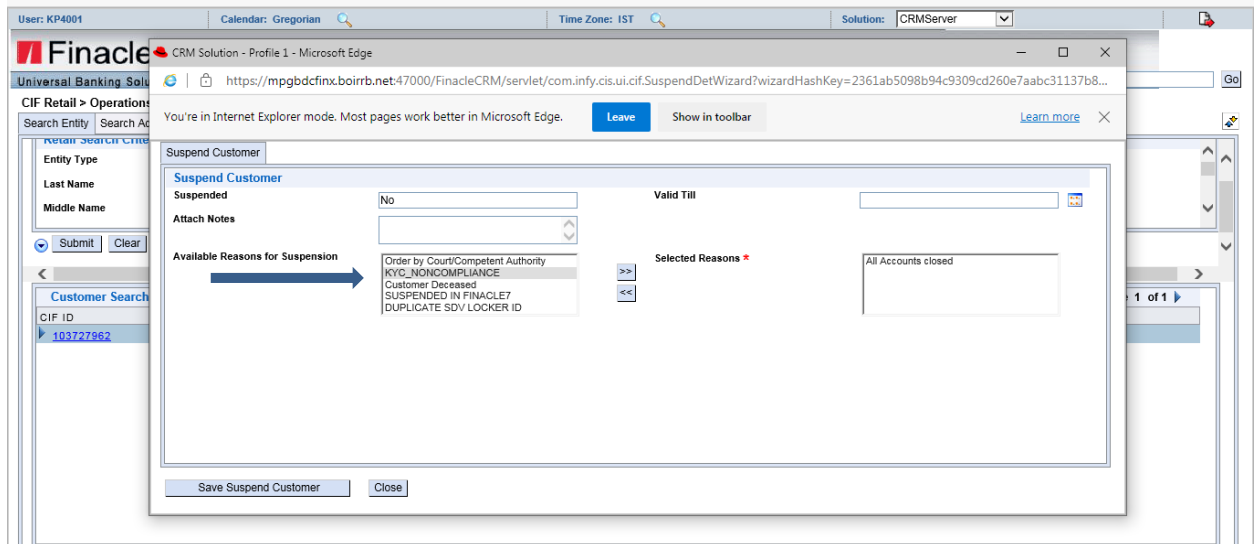
**Customer Search Results**

CIF ID	First Name	Last Name	Suspended	Negated	Blacklisted	Preferred Contact No.
103727962	LAL SINGH	CD				+919878945848

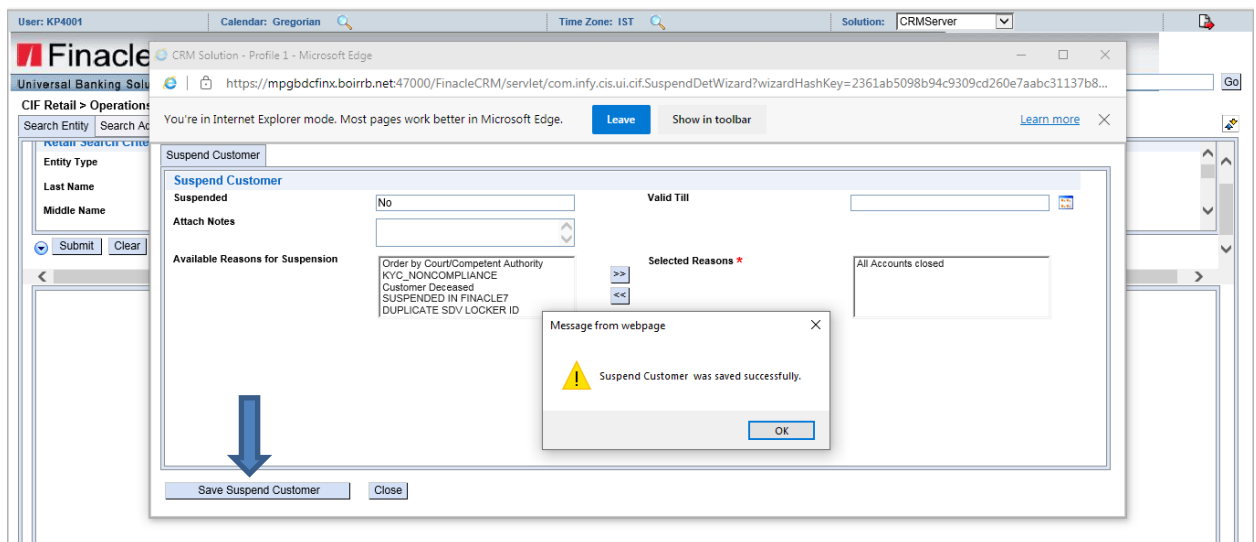
Page 1 of 1

Suspend Customer  
Undo Suspension  
View Reason Codes

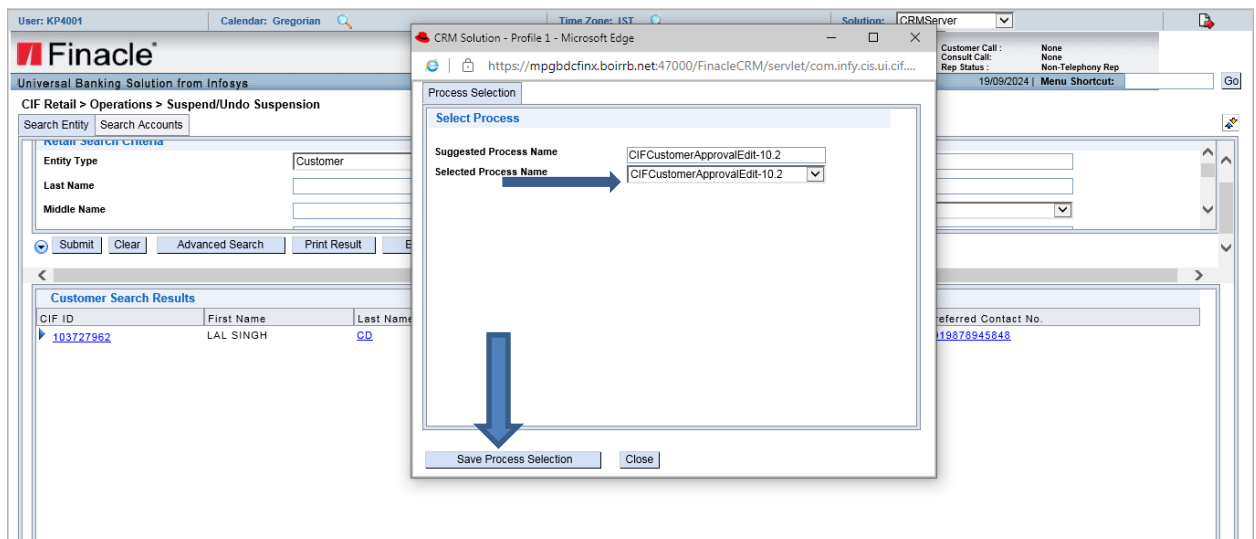
#### 4- DOUBLE CLICK ON THE 'AVAILABLE REASONS FOR SUSPENSION'



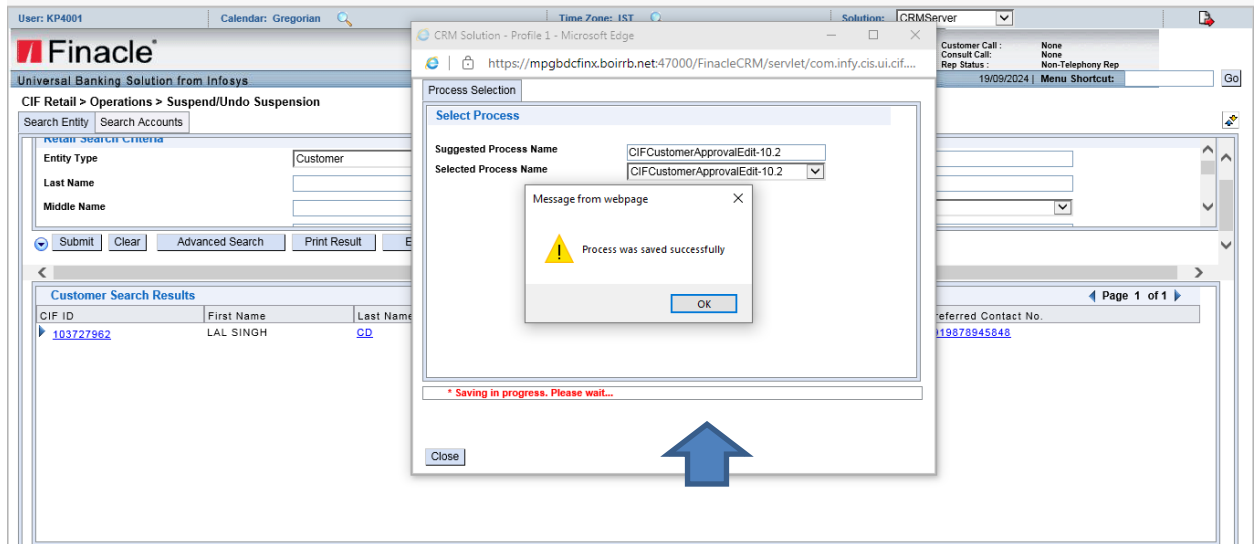
#### 5- CLICK ON SAVE SUSPEND CUSTOMER



#### 6- SELECT 'SELECTED PROCESS NAME-> CIF CUSTOMER APPROVALEDIT-10.2. CLICK ON 'SAVE PROCESS SELECTION'

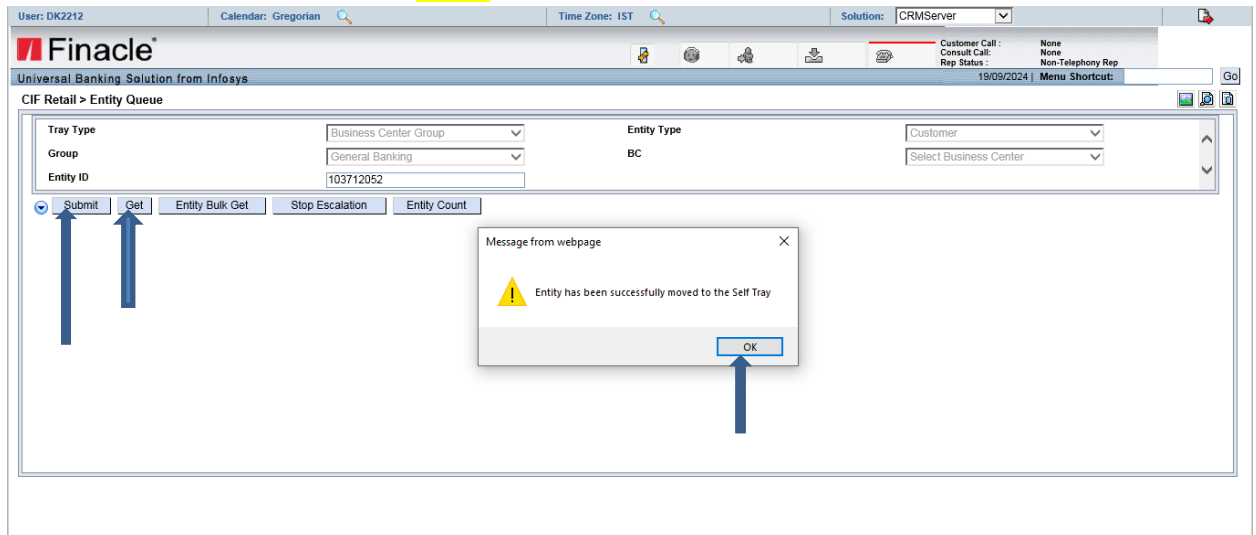


## 7- CLICK ON OK



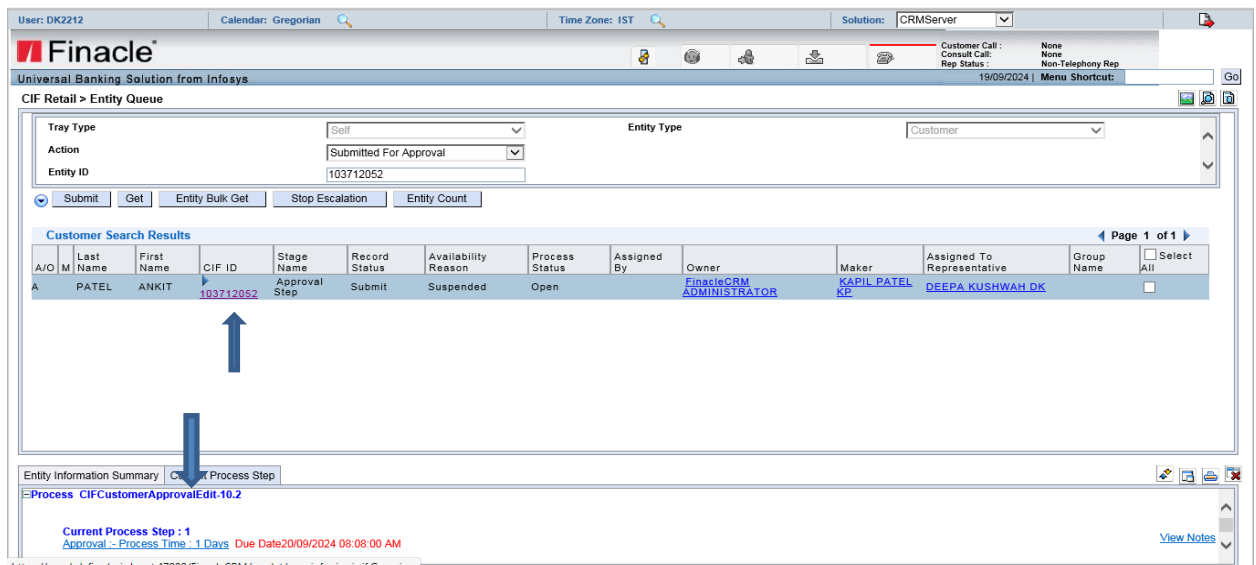
## 8- NOW VERIFY THE CIF

- GO TO EDIT ENTITY -> TRAY TYPE (BUSSINESS CENTER GROUP) -> GROUP (GENERAL BANKING) -> ENTER (ENTITY ID) -> CLICK ON "GET" -> CLICK ON OK -> CLICK ON SUBMIT



## 9- CLICK ON CIF ID.

- CLICK ON 'CURRENT PROCESS STEP'



- **CLICK ON CURRENT PROCESS STEP 1**

The screenshot shows the Finacle CRM interface. At the top, there's a header with user information (User: DK2212, Calendar: Gregorian, Time Zone: IST, Solution: CRMServer). Below this is a navigation bar with 'CIF Retail > Entity Queue'. The main area displays a table of customer search results. The first row is highlighted, showing details for a customer named PATEL ANKIT with CIF ID 103712052. The 'Current Process Step 1' is indicated by a blue arrow pointing to the 'Approval' step in the process flow. The process flow shows 'Approval' as the current step, with a due date of 20/09/2024 08:08:00 AM.

A/O	M	Last Name	First Name	CIF ID	Stage Name	Record Status	Availability Reason	Process Status	Assigned By	Owner	Maker	Assigned To Representative	Group Name	Select
A		PATEL	ANKIT	103712052	Approval Step	Submit	Suspended	Open		FinacleCRM ADMINISTRATOR	KAPIL PATEL KP	DEEPA KUSHWAH DK		<input type="checkbox"/>

Entity Information Summary | Current Process Step  
 Process: CIFCustomerApprovalEdit-10.2  
 Current Process Step : 1  
 Approval :- Process Time : 1 Days Due Date 20/09/2024 08:08:00 AM  
<https://mpgbdcfmx.boirb.net:47000/FinacleCRM/servlet/com.infy.cis.ui.cif.Generic...>

## 10- SELECT VALID 'DECISION'

- **CLICK ON 'SAVE APPROVAL FORM'**

The screenshot shows the Finacle CRM interface with the 'Approval Form' dialog box open. The dialog box contains fields for Title (MR.), Last Name (PATEL), First Name (ANKIT), CIF ID (103712052), Date of Birth (09/06/1996), and Decision (Approve). A blue arrow points to the 'Decision' dropdown menu, which is currently set to 'Approve'. Another blue arrow points to the 'Save Approval Form' button at the bottom of the dialog box. The background shows the same customer search results as the previous screenshot.

Approval Form

Decision

Title: MR. Last Name: PATEL  
 First Name: ANKIT CIF ID: 103712052  
 Date of Birth: 09/06/1996  
 Decision: Approve Remarks:   
[View Audit Trail](#)

Save Approval Form Close

Current Process Step : 1  
 Approval :- Process Time : 1 Days Due Date 20/09/2024 08:08:00 AM

## 11- SYSTEM WILL SHOW MESSAGE “APPROVAL FORM WAS SAVED SUCCESSFULLY”

NOW THE CIF IS VERIFIED SUCCESSFULLY

The screenshot displays the Finacle CRM interface. At the top, the header includes the user ID 'DK2212', the calendar 'Gregorian', the time zone 'IST', and the solution 'CRMServer'. The main menu shows 'Customer Call : None', 'Consult Call : None', and 'Rep Status : Non-Telephony Rep'. The date '19/09/2024' and a 'Menu Shortcut' button are also visible. The main content area is titled 'CIF Retail > Entity Queue'. It features a form with fields for 'Tray Type' (set to 'Self'), 'Entity Type' (set to 'Customer'), 'Action' (set to 'Submitted For Approval'), and 'Entity ID' (set to '103712052'). Below the form are buttons for 'Submit', 'Get', 'Entity Bulk Get', 'Stop Escalation', and 'Entity Count'. A 'Customer Search Results' table is visible, with columns for 'A/O', 'M', 'Last Name', 'First Name', 'CIF ID', 'Stage Name', 'Record Status', and 'Availability'. A modal dialog box titled 'Message from webpage' is centered on the screen, displaying a yellow warning icon and the text 'Approval Form was saved successfully.' with an 'OK' button. A blue arrow points to the 'OK' button. The background table shows a single row of data with the following values: A/O: 1, M: 1, Last Name: M, First Name: M, CIF ID: 103712052, Stage Name: M, Record Status: M, Availability: M.

User: DK2212 | Calendar: Gregorian | Time Zone: IST | Solution: CRMServer

Finacle®

Universal Banking Solution from Infosys

CIF Retail > Entity Queue

Tray Type: Self | Entity Type: Customer

Action: Submitted For Approval | Entity ID: 103712052

Submit | Get | Entity Bulk Get | Stop Escalation | Entity Count

Customer Search Results

A/O	M	Last Name	First Name	CIF ID	Stage Name	Record Status	Availability
1	1	M	M	103712052	M	M	M

Message from webpage

Approval Form was saved successfully.

OK