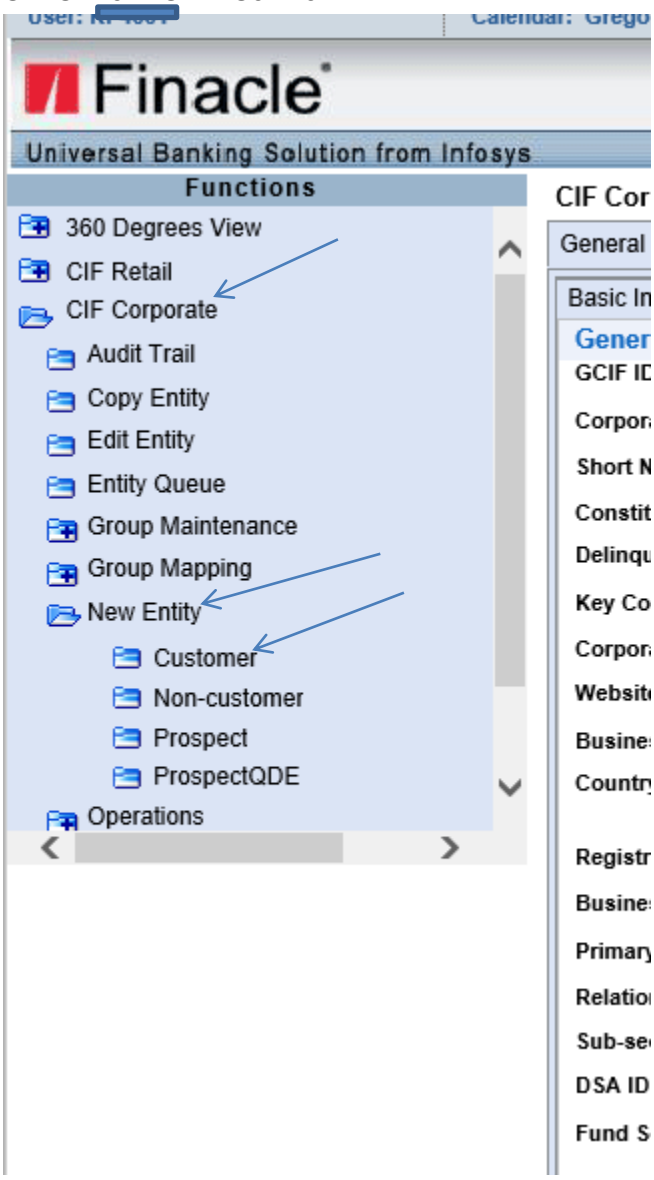
# Madhya Pradesh Gramin Bank

( A Joint Venture of Govt of India, MP Govt. & Bank of India )

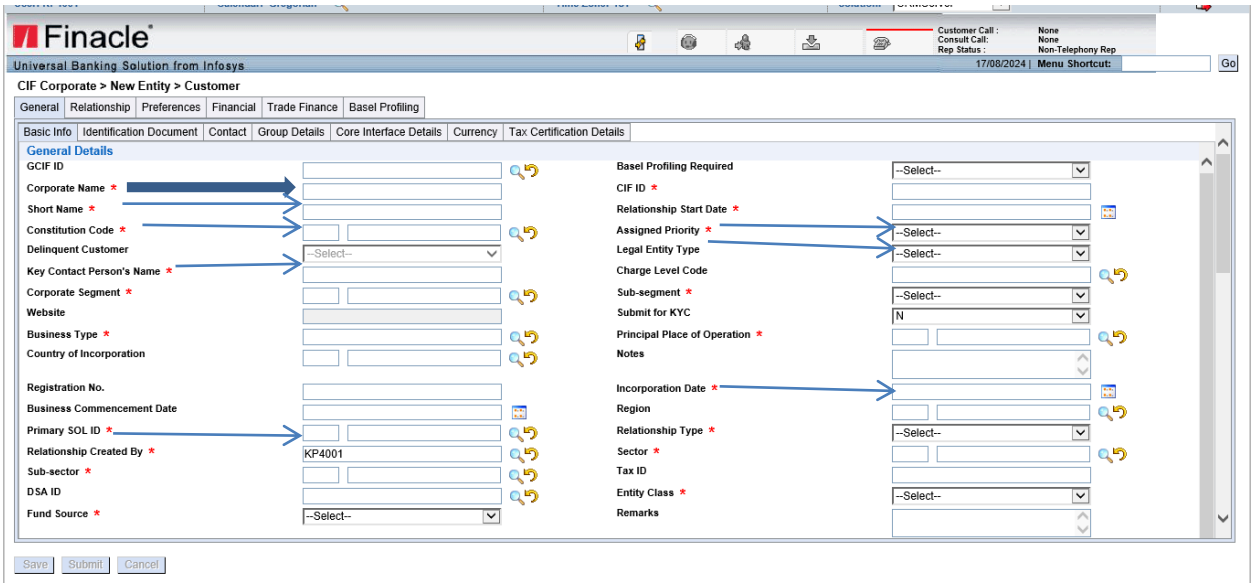
## NEW CORPORATE CIF MAKING PROCESS

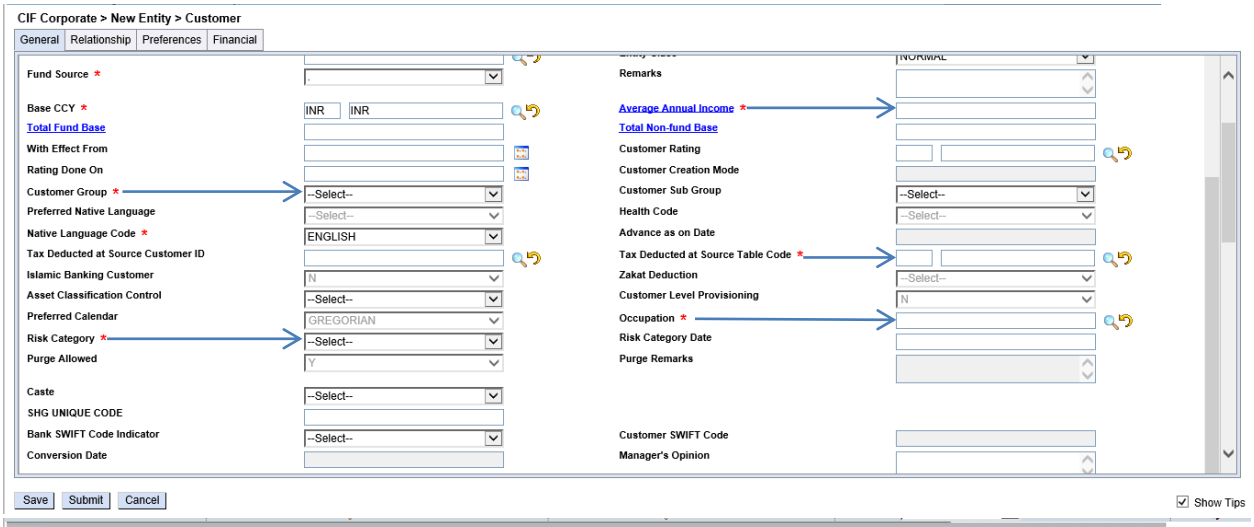
**SELECT CRM SERVER**

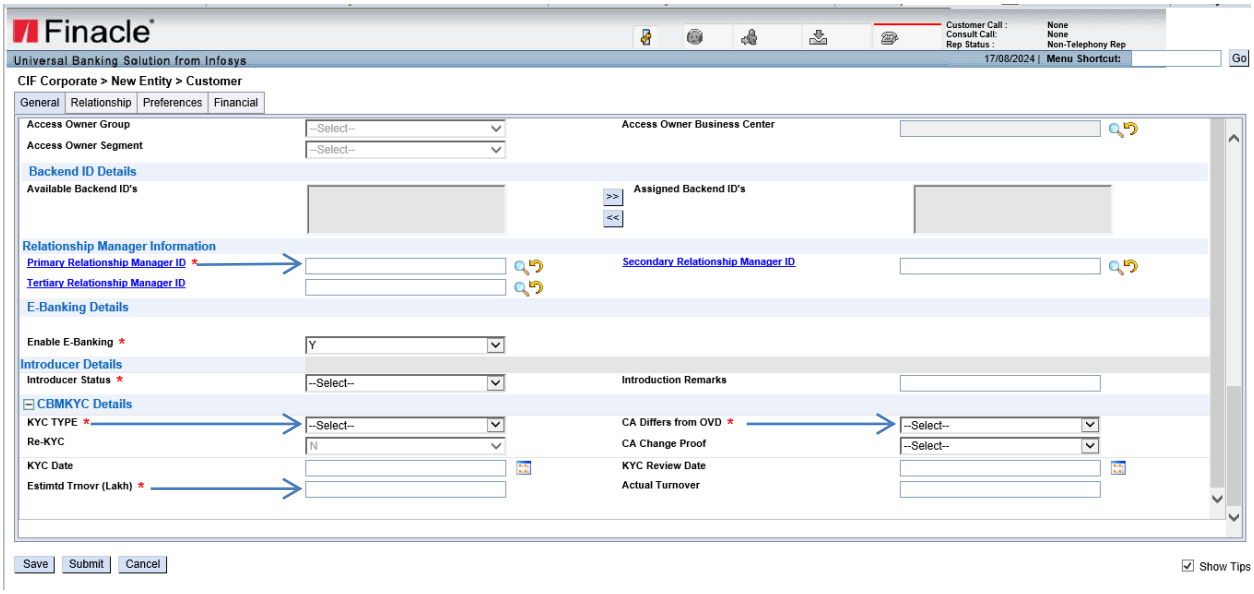
**1- CLICK ON CIF CORPORATE-> NEW ENTITY-> CUSTOMER**



2- ENTER THE FIELDS WITH VALID DATA 'GENERAL-> BASIC INFO'

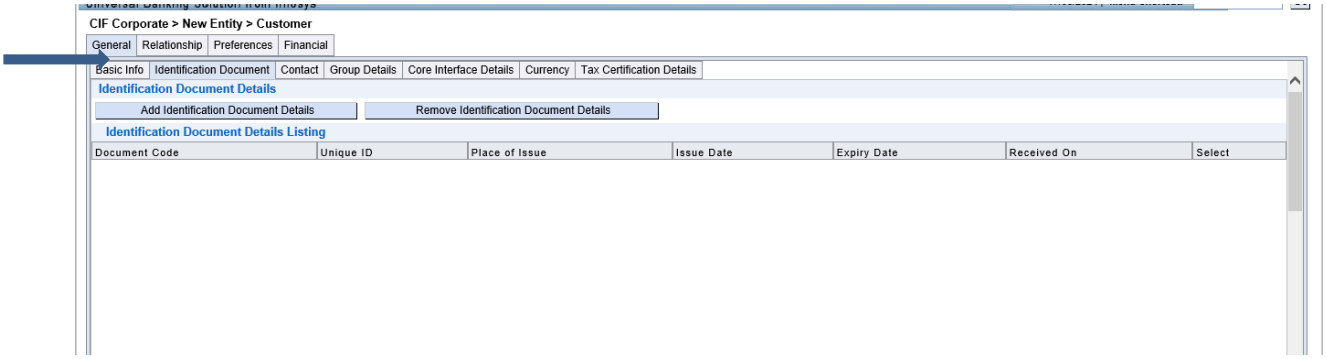


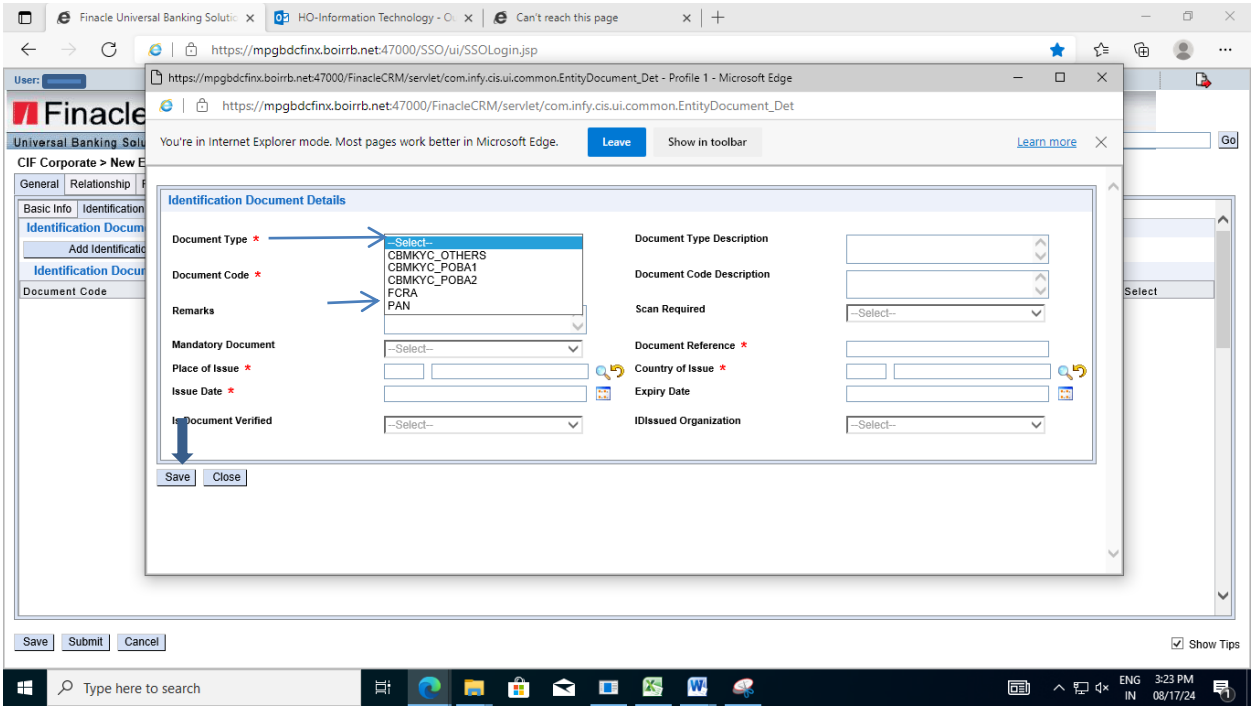



3- CLICK ON 'IDENTIFICATION DOCUMENT' TAB THEN CLICK ON ADD IDENTIFICATION DOCUMENT DETAILS

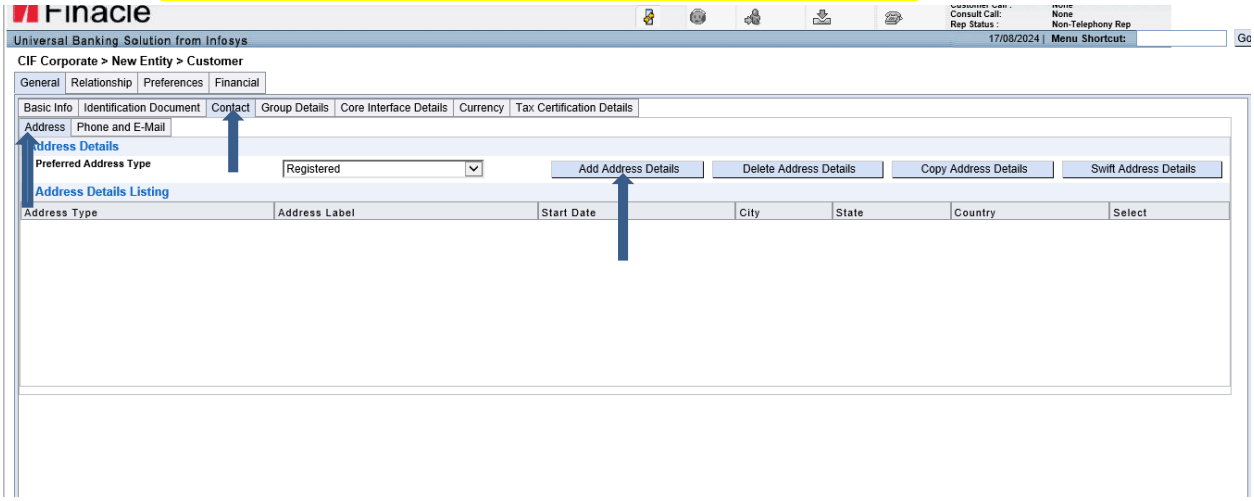
**IF PAN NO. NOT AVAILABLE THEN ENTER 'FORM60'**



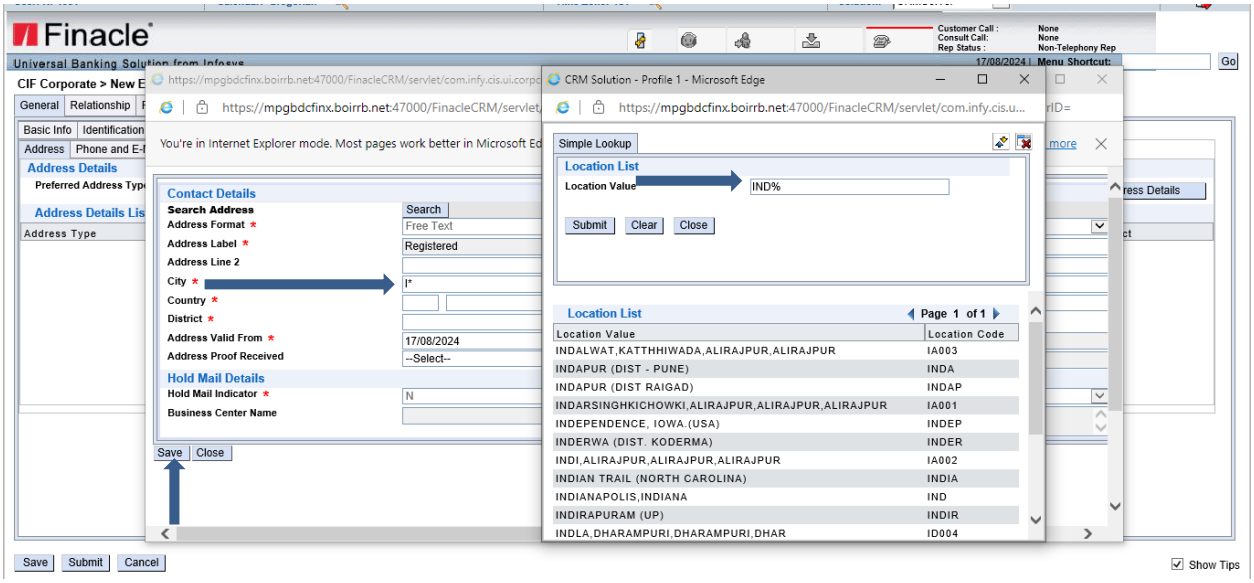

4- SELECT VALID DOCUMENT TYPE AND CLICK ON SAVE



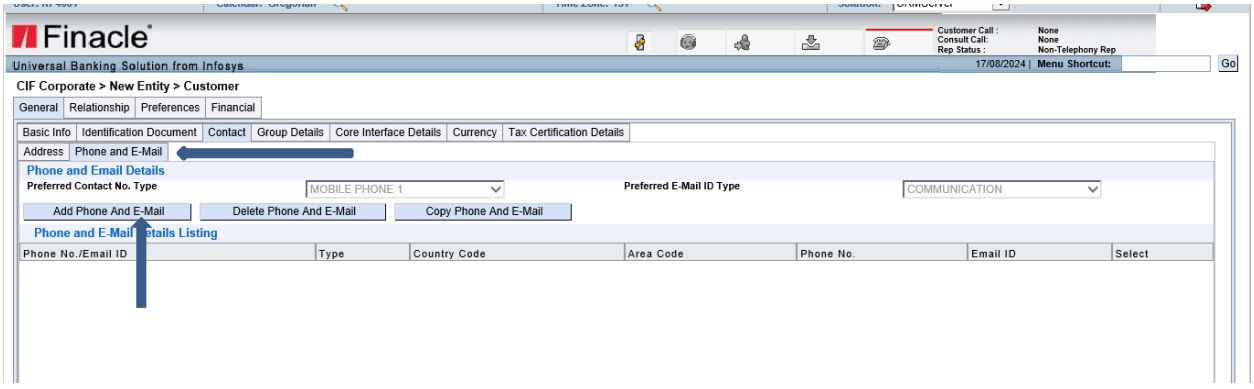
5- CLICK ON CONTACT TAB-> ADDRESS-> ADD ADDRESS DETAILS




6- FOR 'CITY / STATE/ COUNTRY /DISTRICT' ENTER FIRST THREE LETTERS WITH * MARK AND CLICK ON SEARCHER
NEW PAGE WILL OPEN 'AT LOCATION VALUE FIELD ENTER CITY/DISTRICT WITH % SIGN'AND SUBMIT IT.
SELECT VALID DATA AND SAVE IT

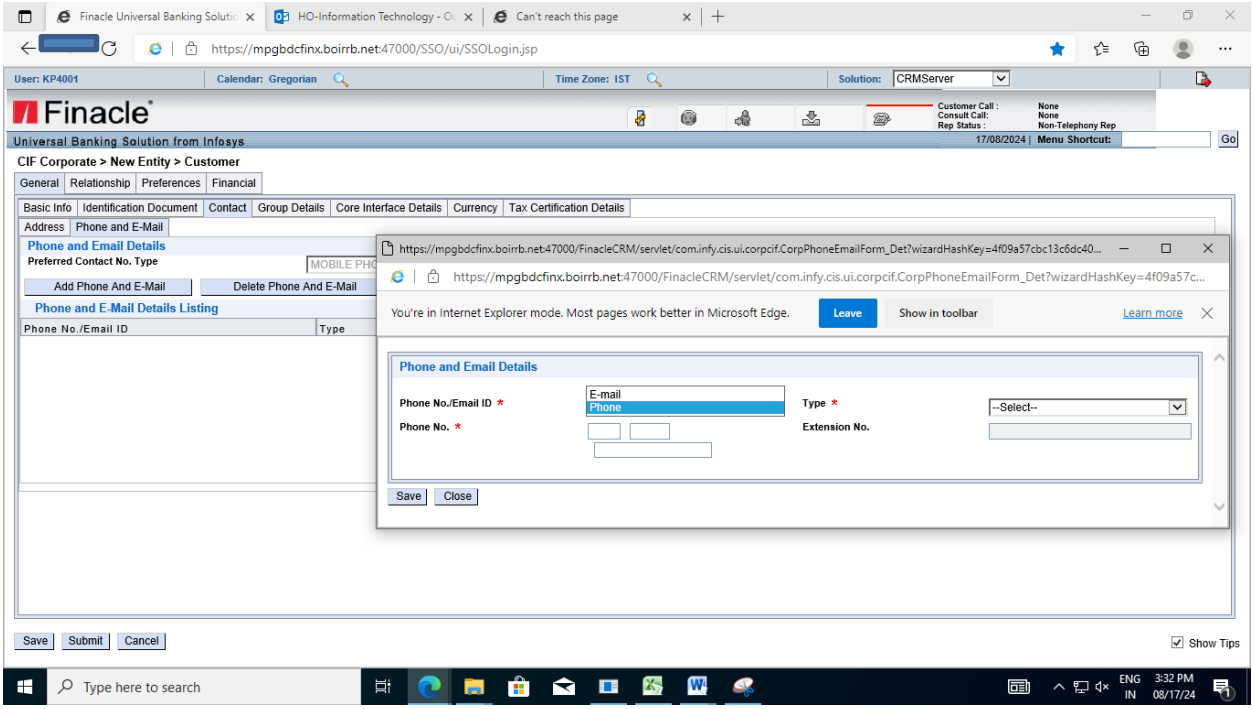


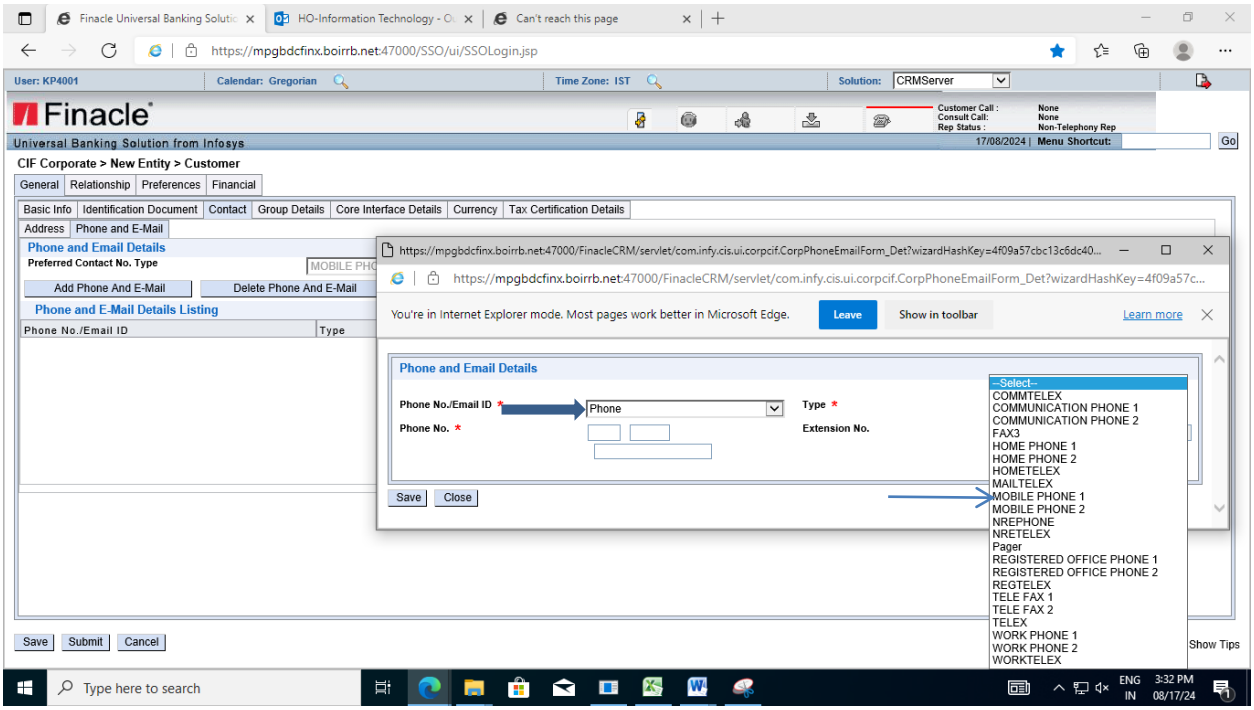

7- CLICK ON 'PHONE AND E-MAIL-> ADD PHONE AND E-MAIL'



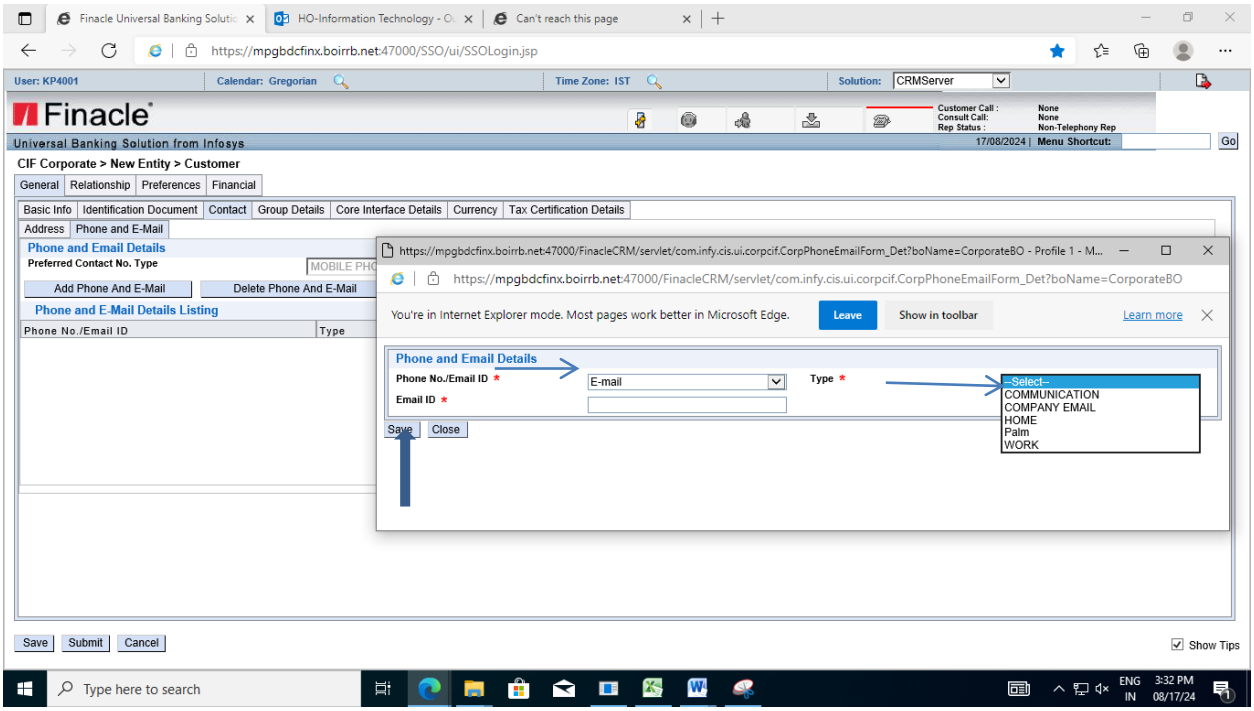
8- SELECT PHONE-> TYPE AS MOBILE PHONE 1 THEN SAVE IT

*PHONE NO. AS 'FIRST BOX-> 91, THIRD BOX 10 DIGIT MOBILE NO.'

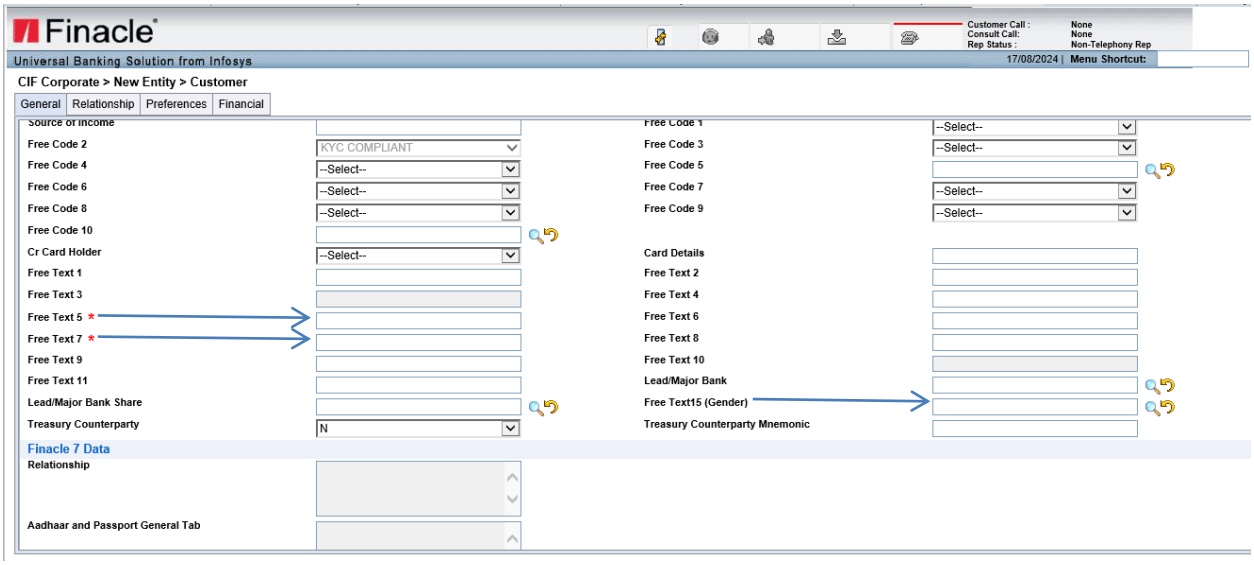


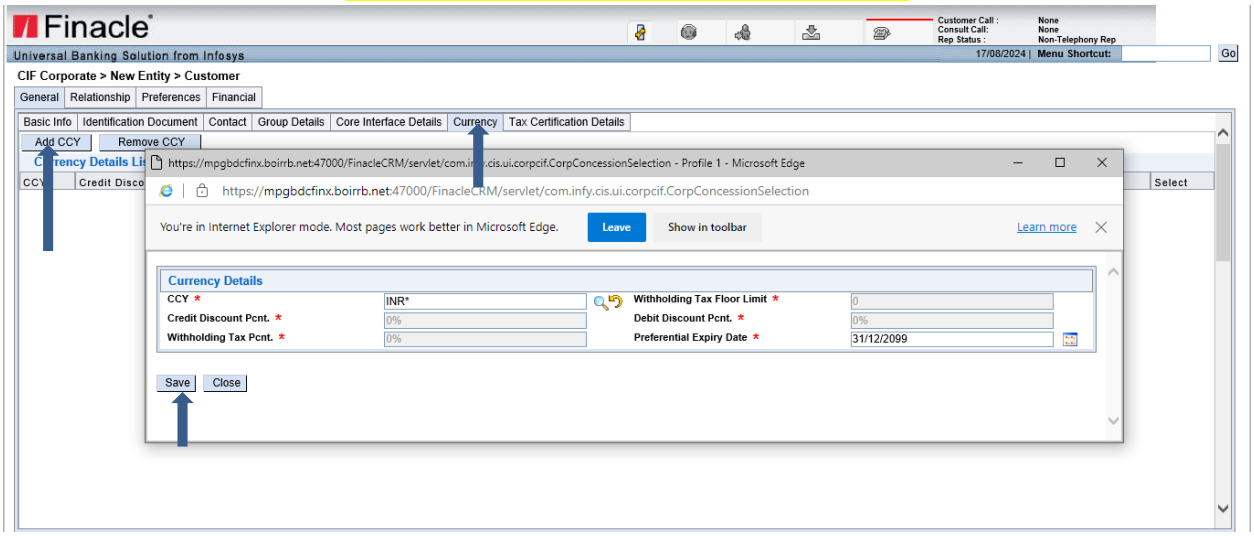
9- AGAIN CLICK ON ADD PHONE AND E-MAIL AND SELECT E-MAIL-> TYPE AS COMMUNICATION THEN SAVE IT



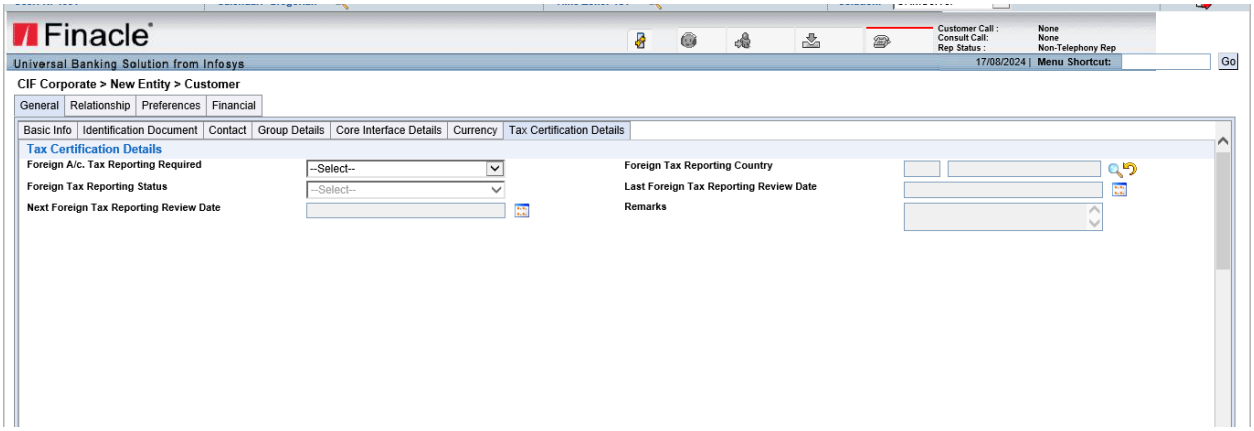

10- CLICK ON 'CORE INTERFACE DETAILS'
ENTER 'FREE TEXT 5-> REGULAR'
FREE TEXT 7-> WALKIN'
FREE TEXT15 (GENDER)-> M-MALE/ F-FEMALE/ O-OTHER'



11- NOW CLICK ON 'CURRENCY' TAB -> ADD CCY-> SAVE




12- NOW CLICK ON 'TAX CERTIFICATON DETAILS'
ENTER 'FOREIGN A/C TAX REPORTING REQUIRED' AS 'N'

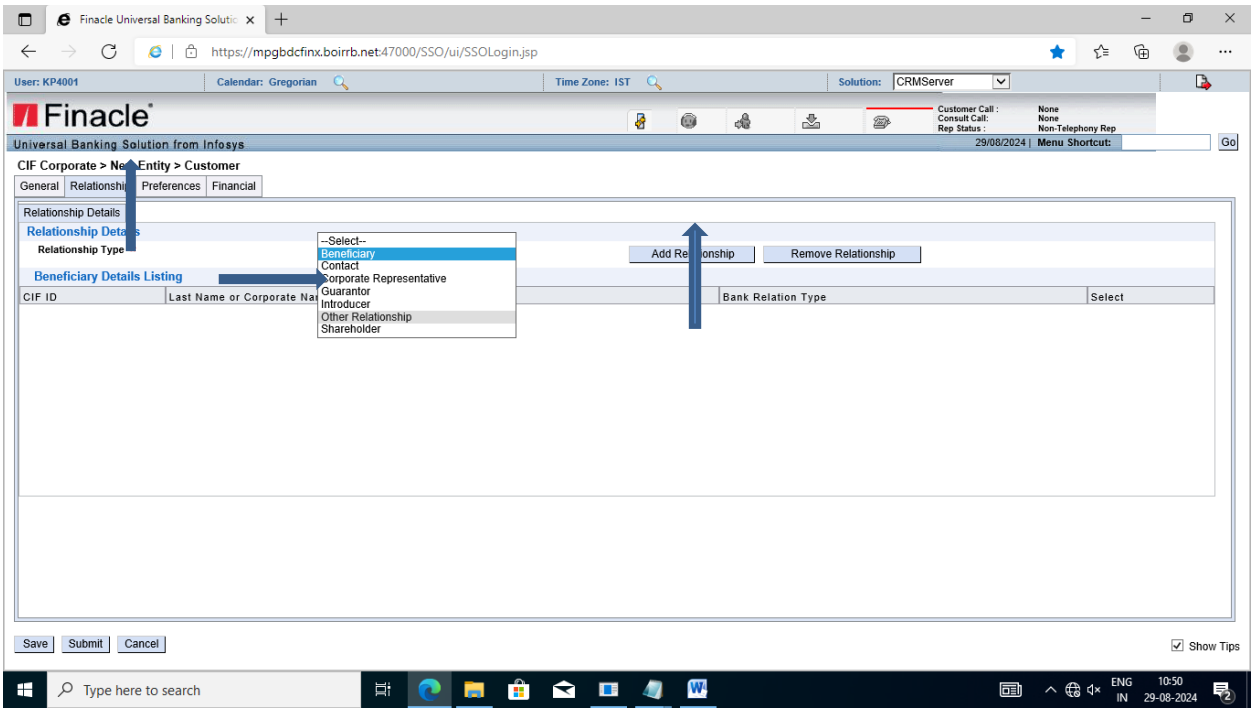


"For error shown below use process" ( from point 13 to point 19)

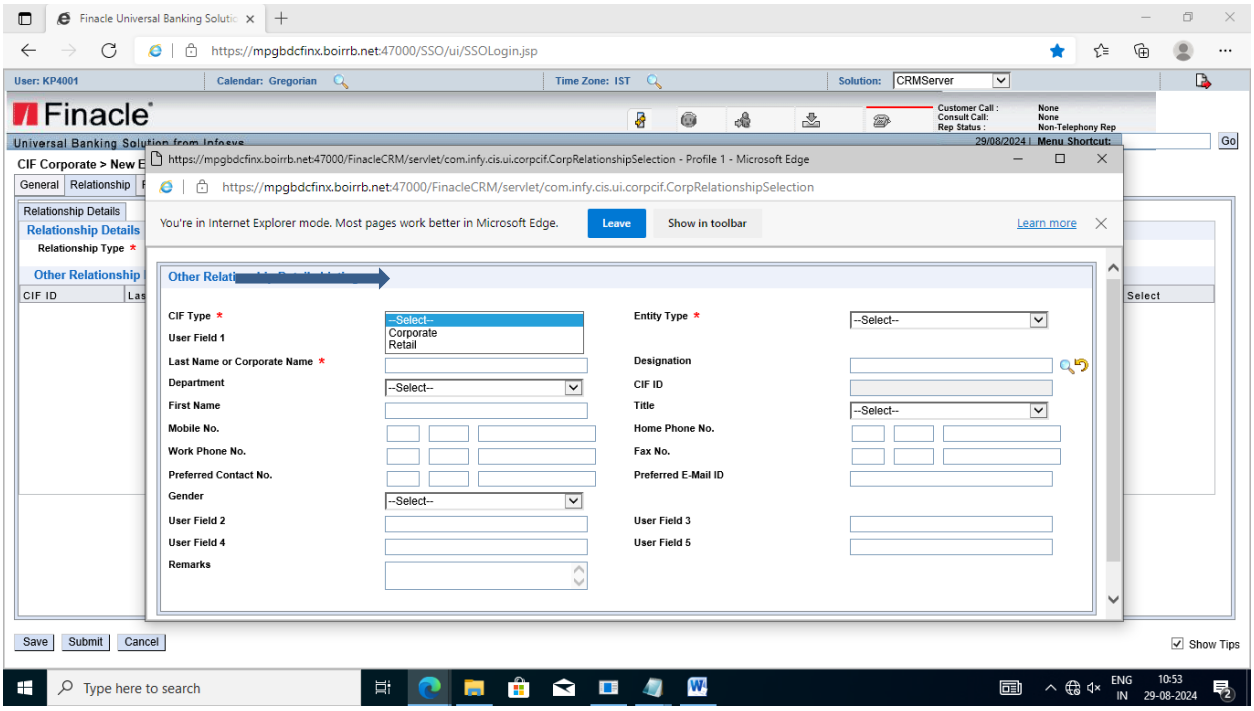
**For the constitution code 51, Enter Beneficial Owner Details in Relationship Tab,under Relationship type-'Other Relationship'**

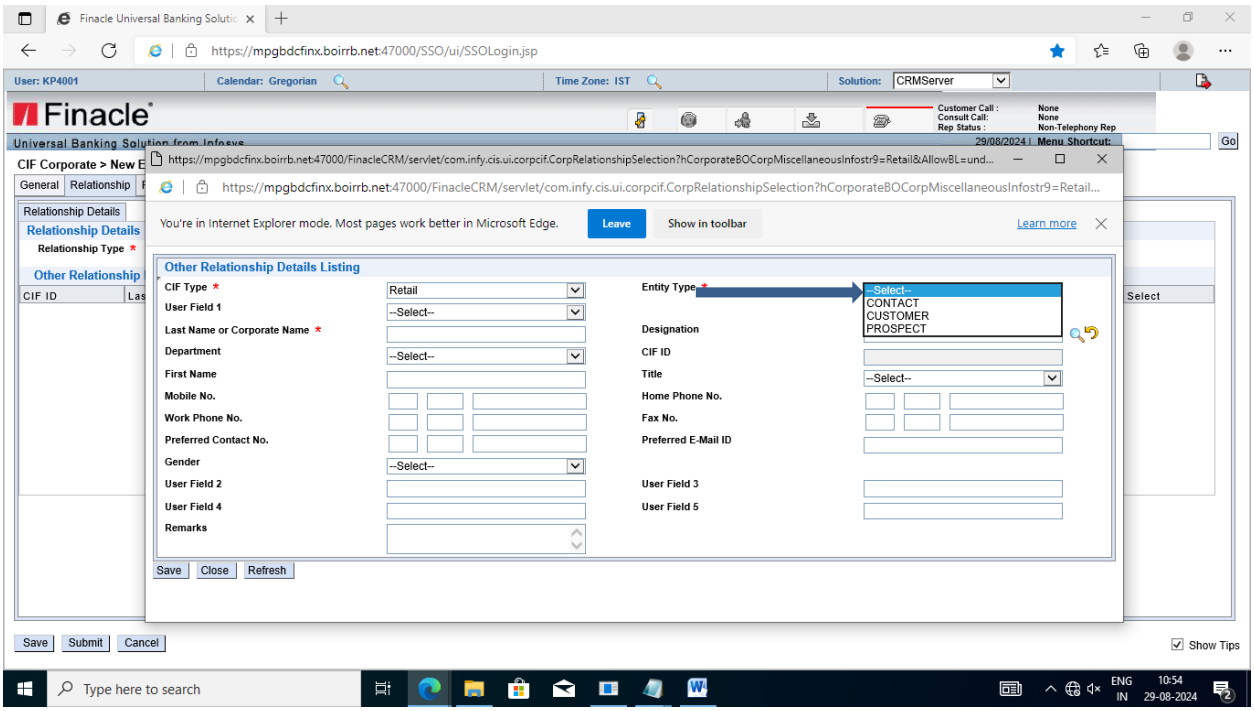
**Or introducer details**

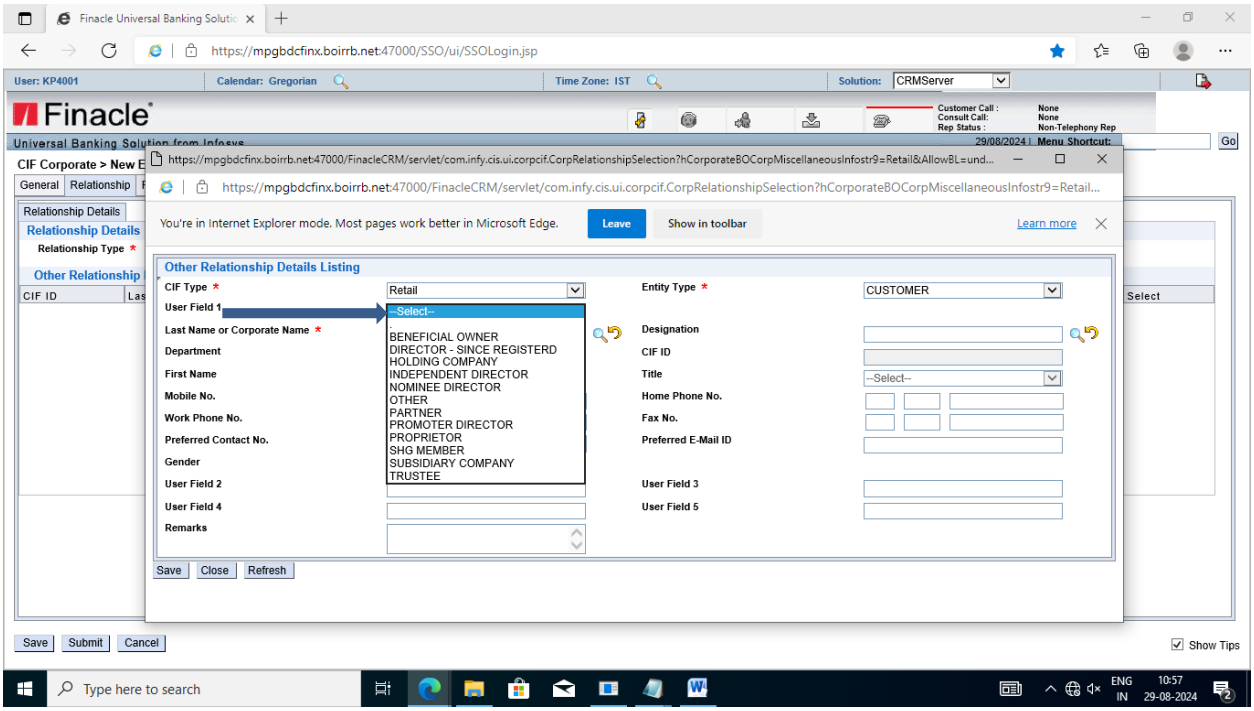
13- Click on 'relationship tab-> other relationship -> Add relationship



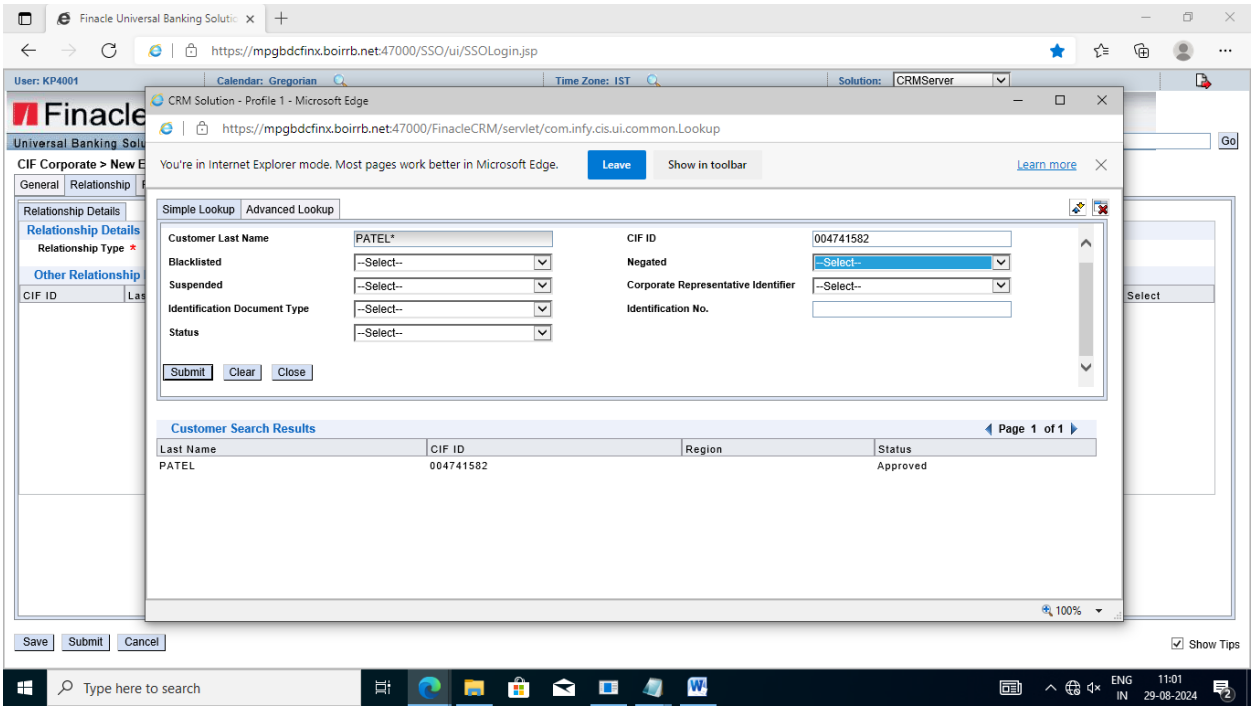
14- Select “cif type, entity type, user field 1” as applicable



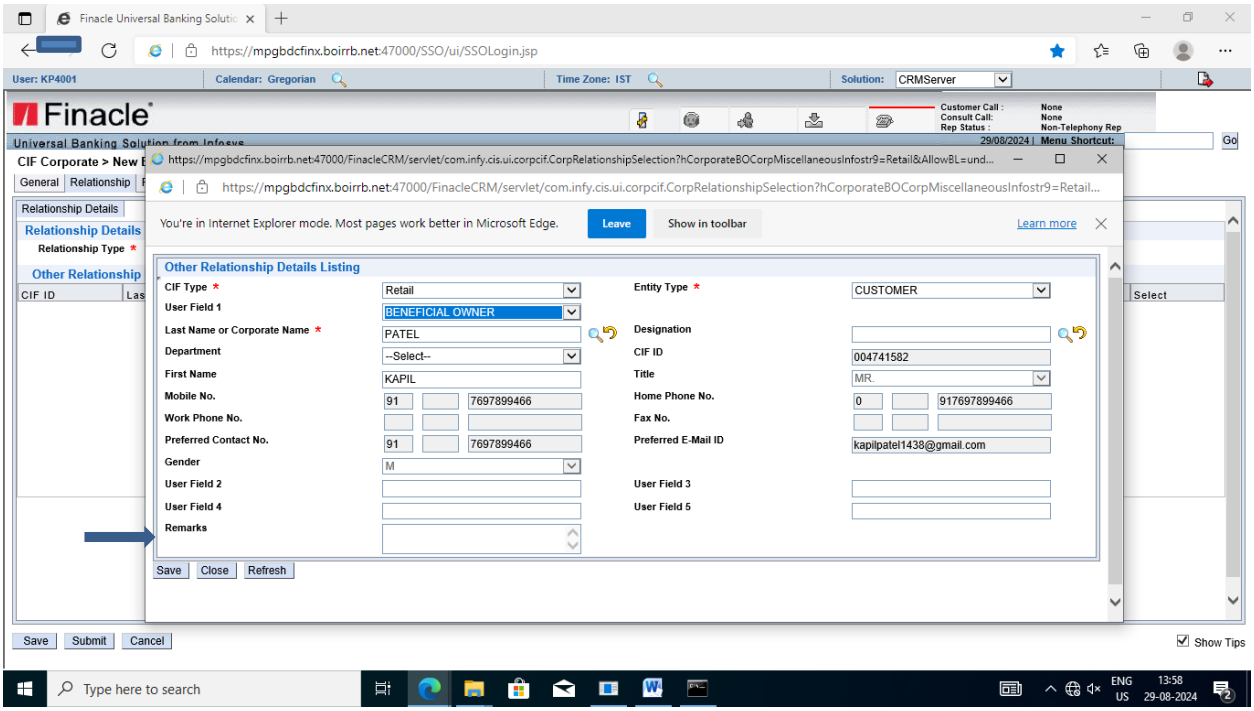






15- Enter last name of owner then click on searcher, new page will open in that enter CIF id of owner/introducer, than click on submit



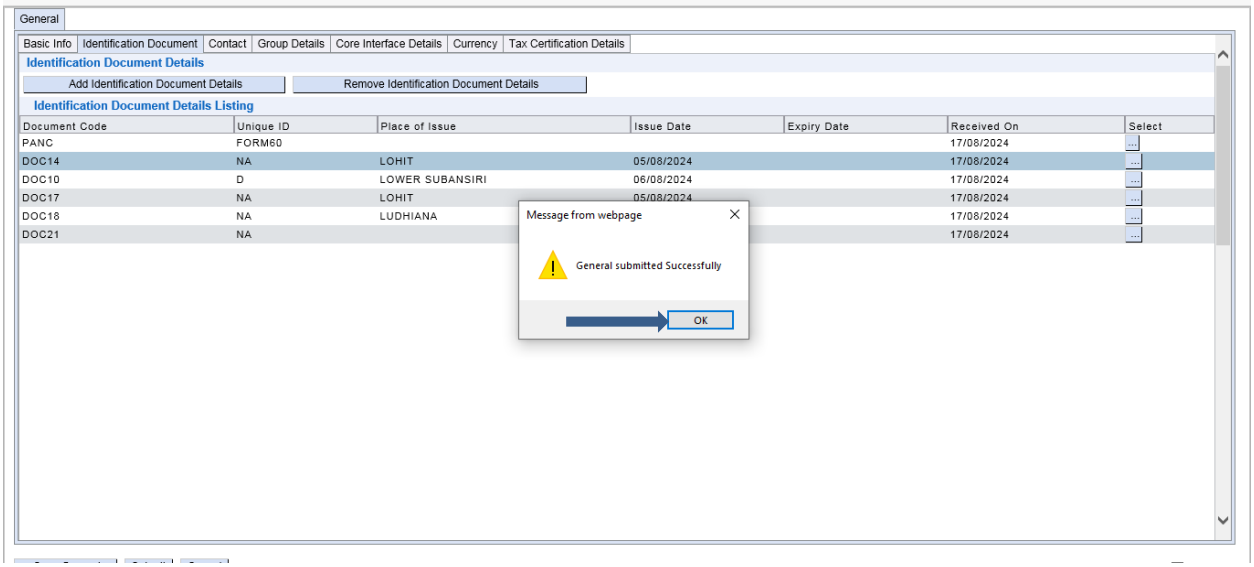
16- All the fields get auto fetch, select user field 1 as – beneficial owner, than click on save



17- CLICK ON SUBMIT

MESSAGE WILL BE SHOWN AS 'GENERAL SUBMITTED SUCCESSFULLY'

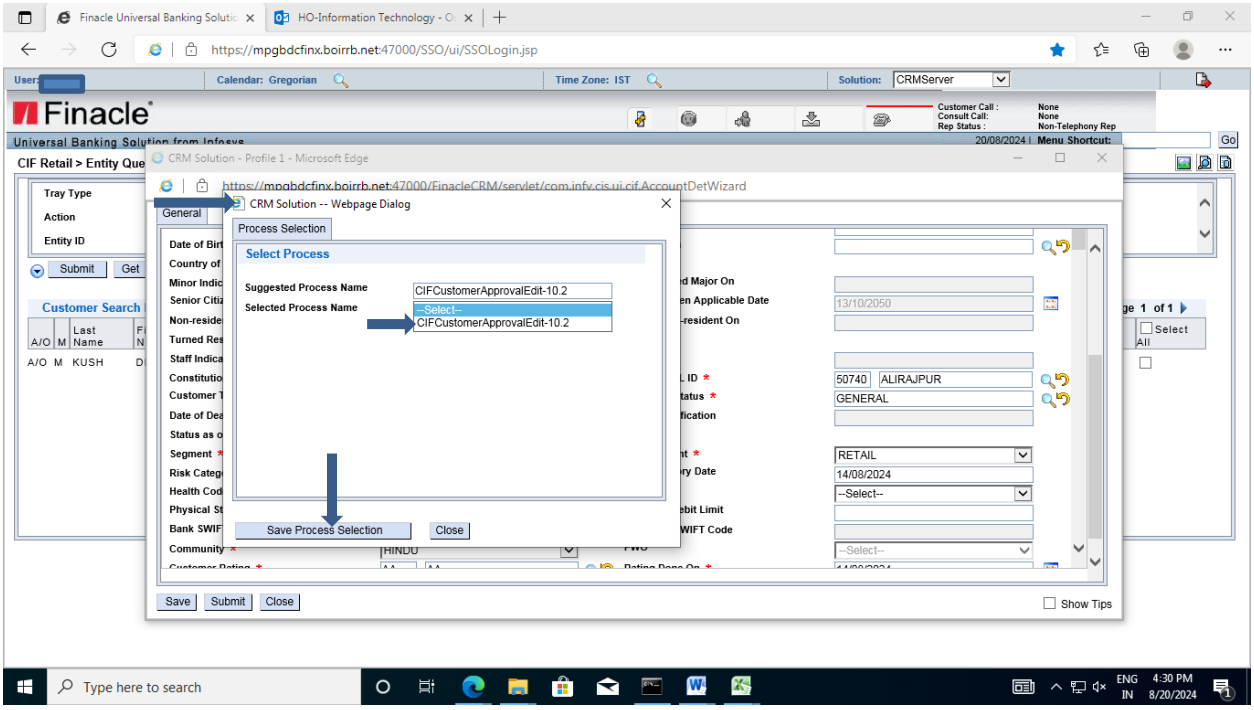
CLICK ON OK



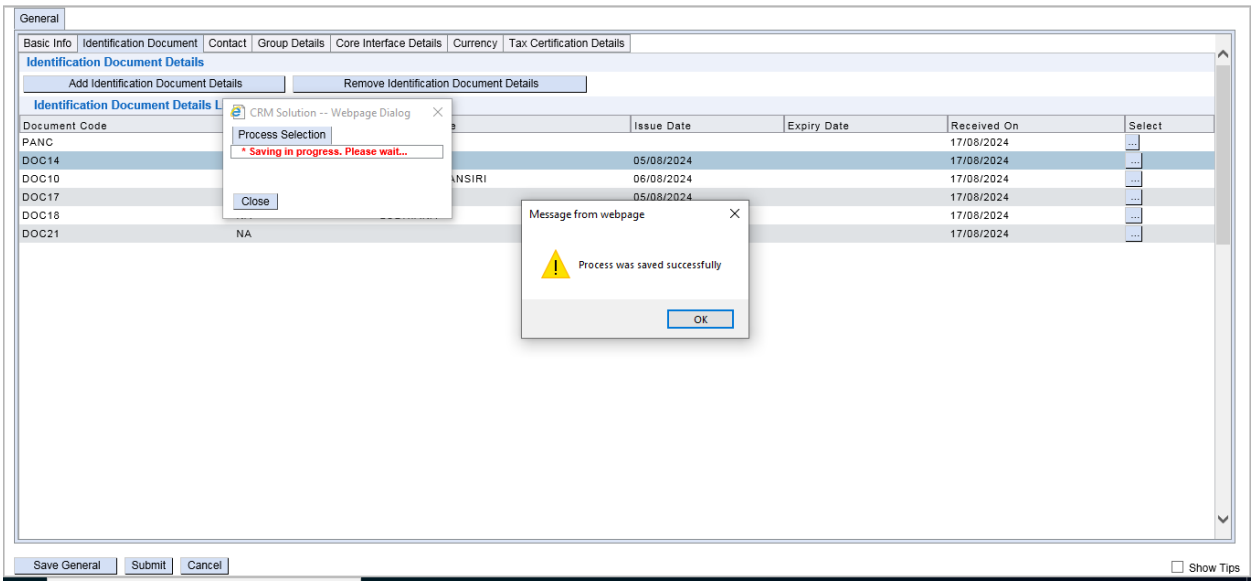

18- NEW POP UP WILL APPEAR

SELECT 'SELECTED PROCESS NAME AS -> CIF CUSTOMER APPROVAL EDIT-10.2"

THEN CLICK ON 'SAVE PROCESS SELECTION'



19- POP UP WILL APPEAR AS "PROCESS WAS SAVED SUCCESSFULLY"




20- IF USER CLICKED ON SAVE OPTION INSTEAD OF SUBMIT THEN THE CIF WILL MOVE TO HIS/HER SELF TRAY

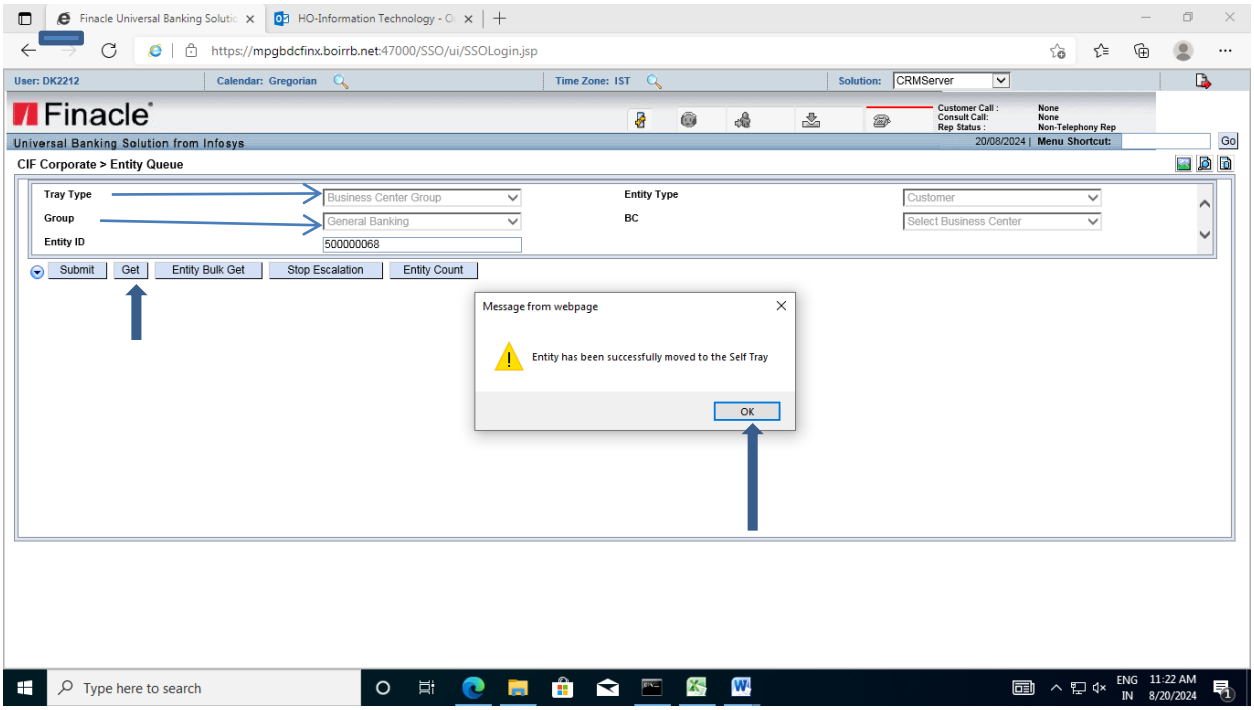
IN THIS CONDITION HE/SHE USED TO FOLLOW THE BELOW PATH

- CIF CORPORATE-> ENTITY QUEUE-> 'TRAY TYPE-> SELF' -> ACTION-> SAVED-> ENTER ENTITY ID (CIF)-> CLICK ON SUBMIT
- CORPORATE ENTITY DETAILS WILL APPEAR
- RIGHT CLICK ON CIF -> EDIT-> GENERAL DETAILS-> NOW CLICK ON SUBMIT

VERIFICATION OF CIF-> CIF IS IN SUBMIT STATUS

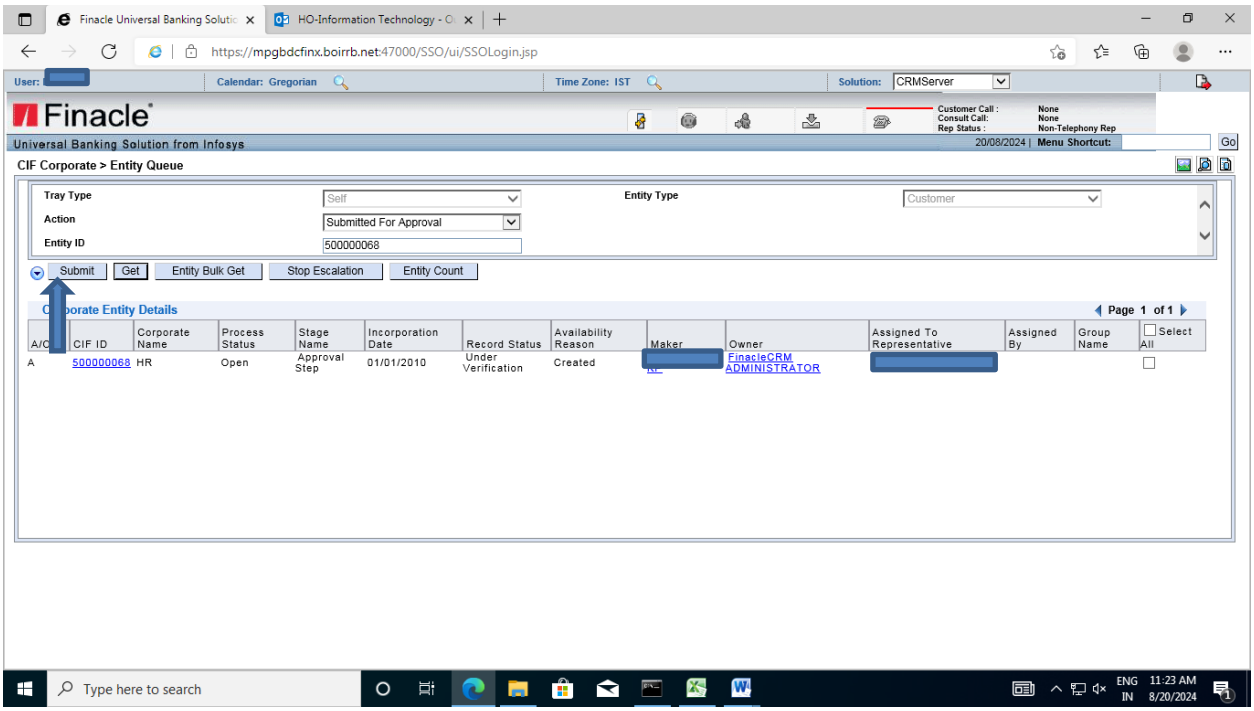
21- VERIFYING USER FOLLOW THE PATH

CIF CORPORATE-> ENTITY QUEUE-> 'TRAY TYPE -> BUSINESS CENTER GROUP' -> ACTION-> GENERAL BANKING-> ENTER ENTITY ID (CIF)-> CLICK ON GET

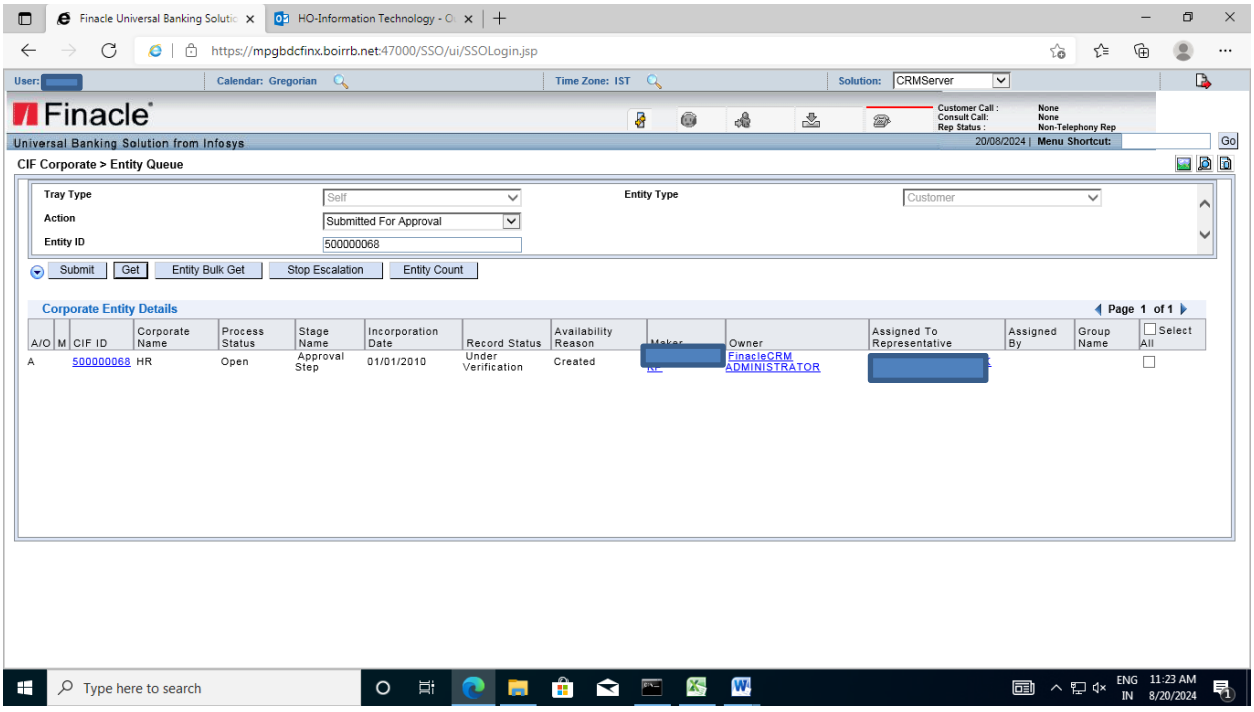



NOW THE CIF HAS BEEN MOVED TO SELF TRAY OF VERIFYING USER

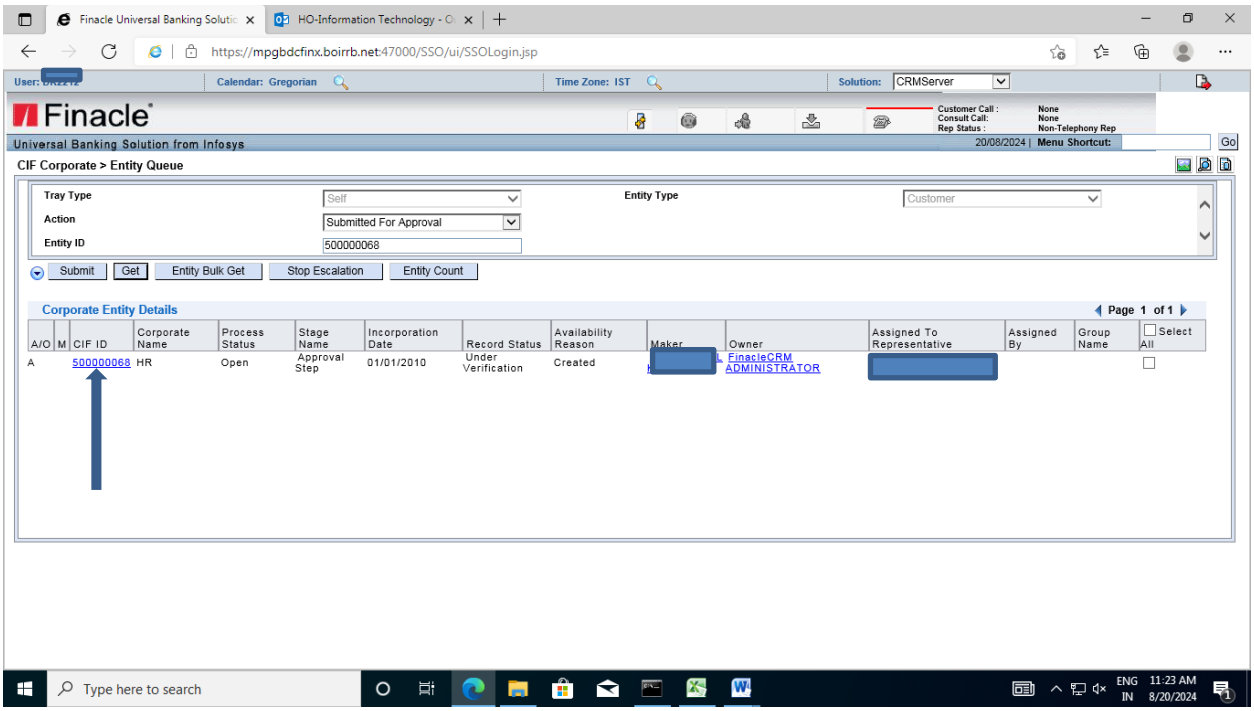
CLICK ON OK




22- 'CORPORATE ENTITY DETAILS' WILL APPEAR

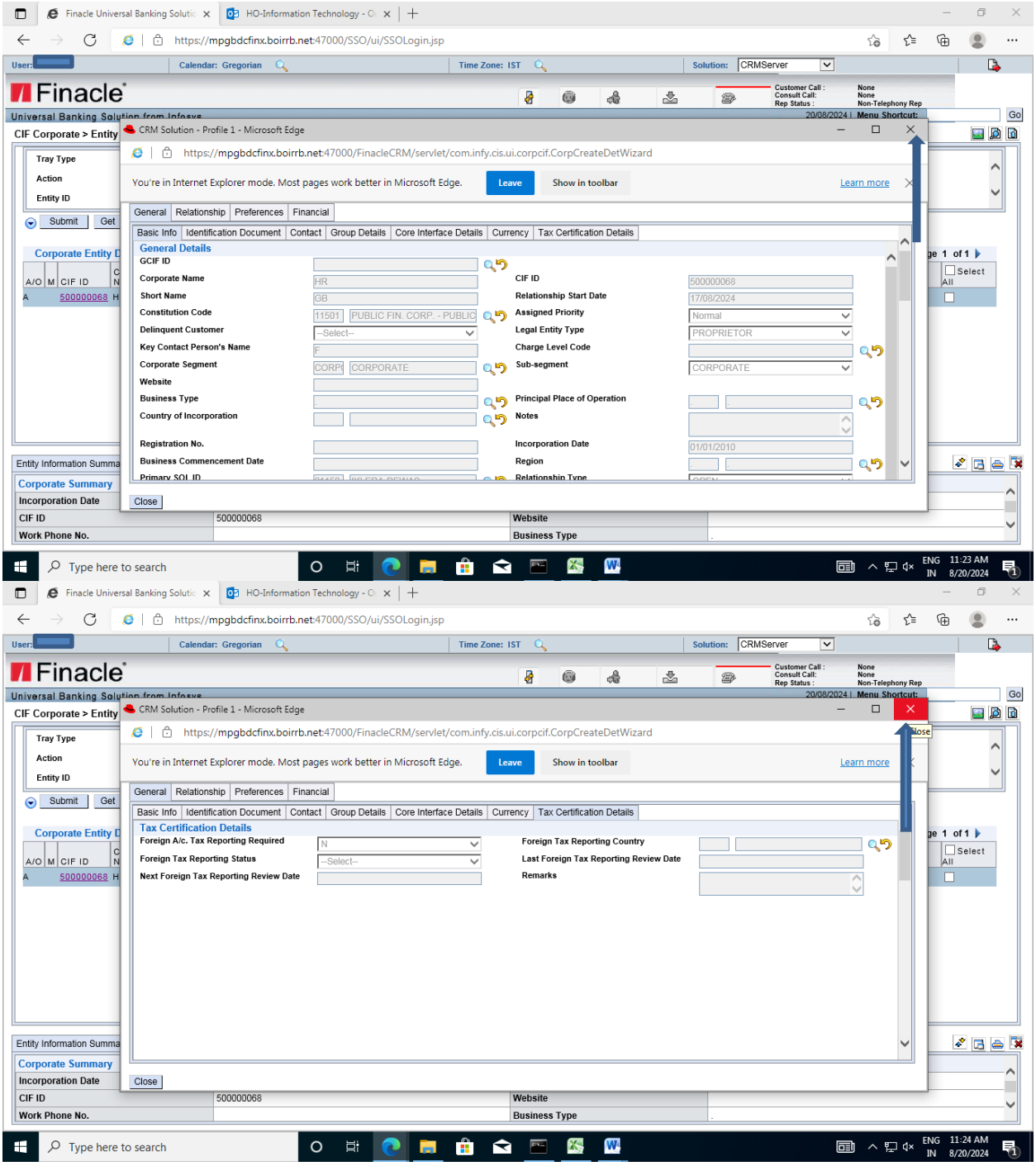


23- CLICK ON CIF ID

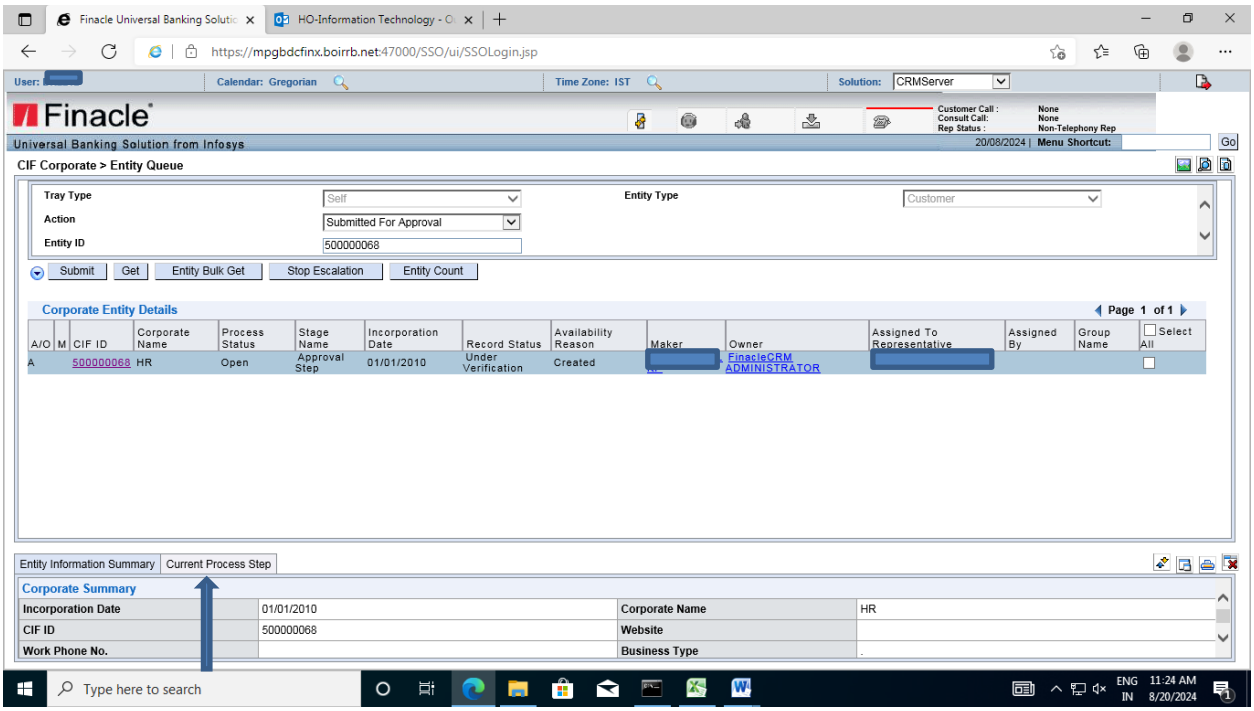



24- VISIT ALL PAGES 'OR' CHECK ALL DETAILS

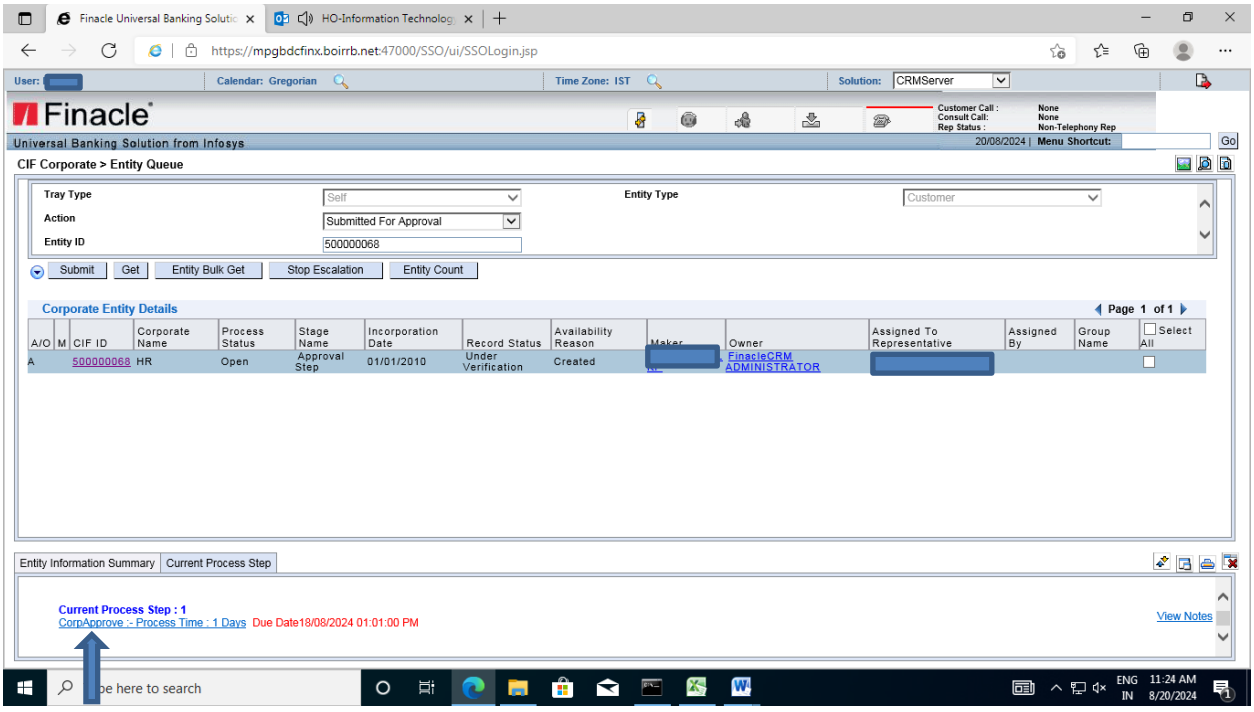
THEN CLICK ON 'CROSS- X'



25- CLICK ON 'CURRENT PROCESS STEP'

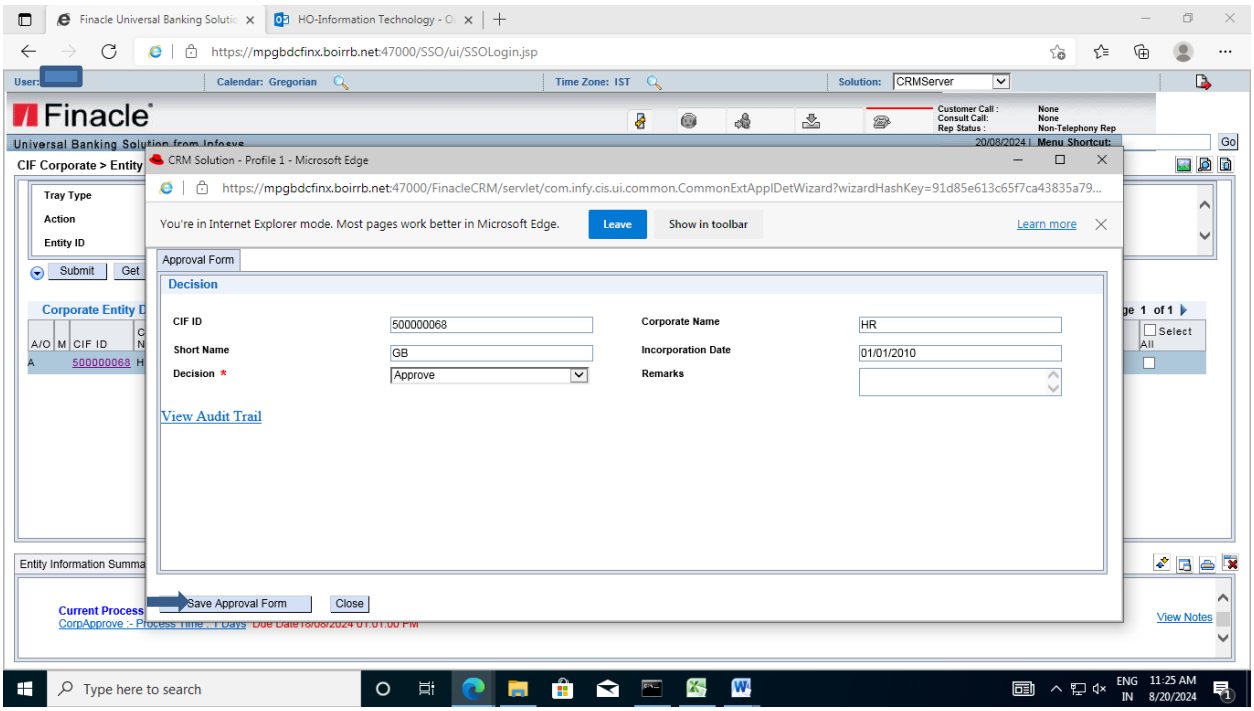



26- CKICK ON LINK 'CORPAPPROVE:-PROCESS TIME'

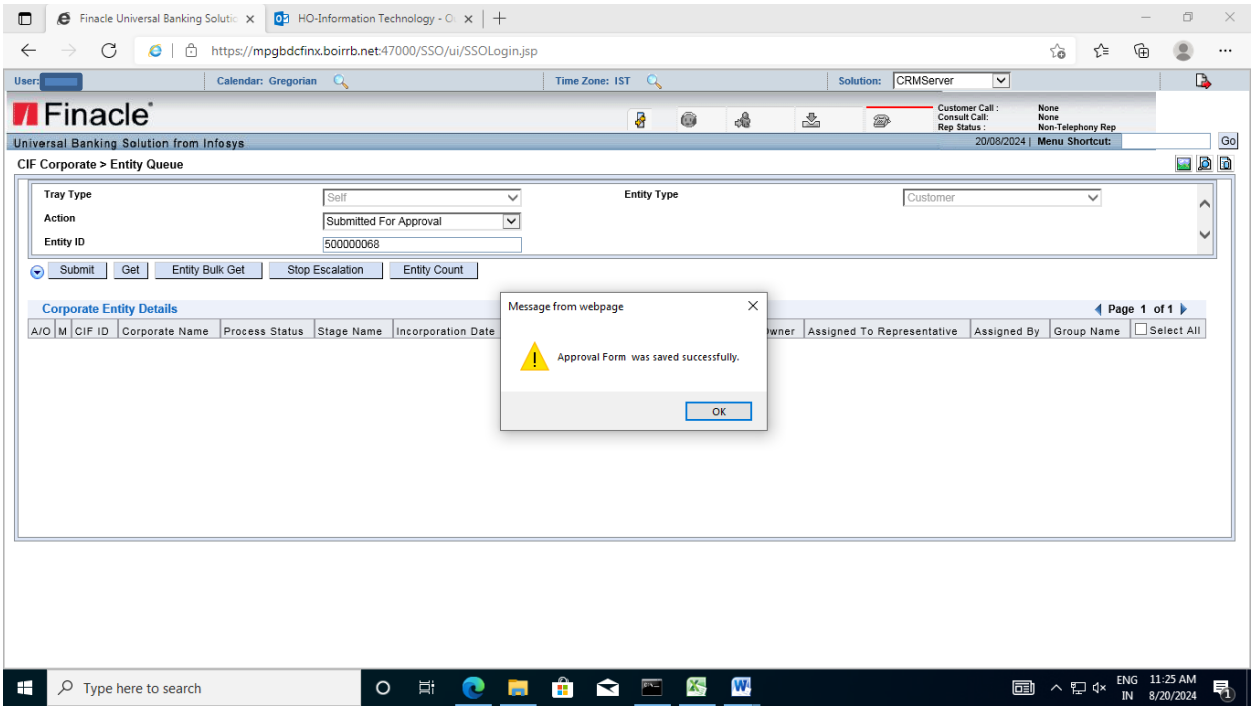



27- NEW PAGE WILL APPEAR AS 'APPROVAL FORM'
SELECT DECESION AS 'APPROVE'

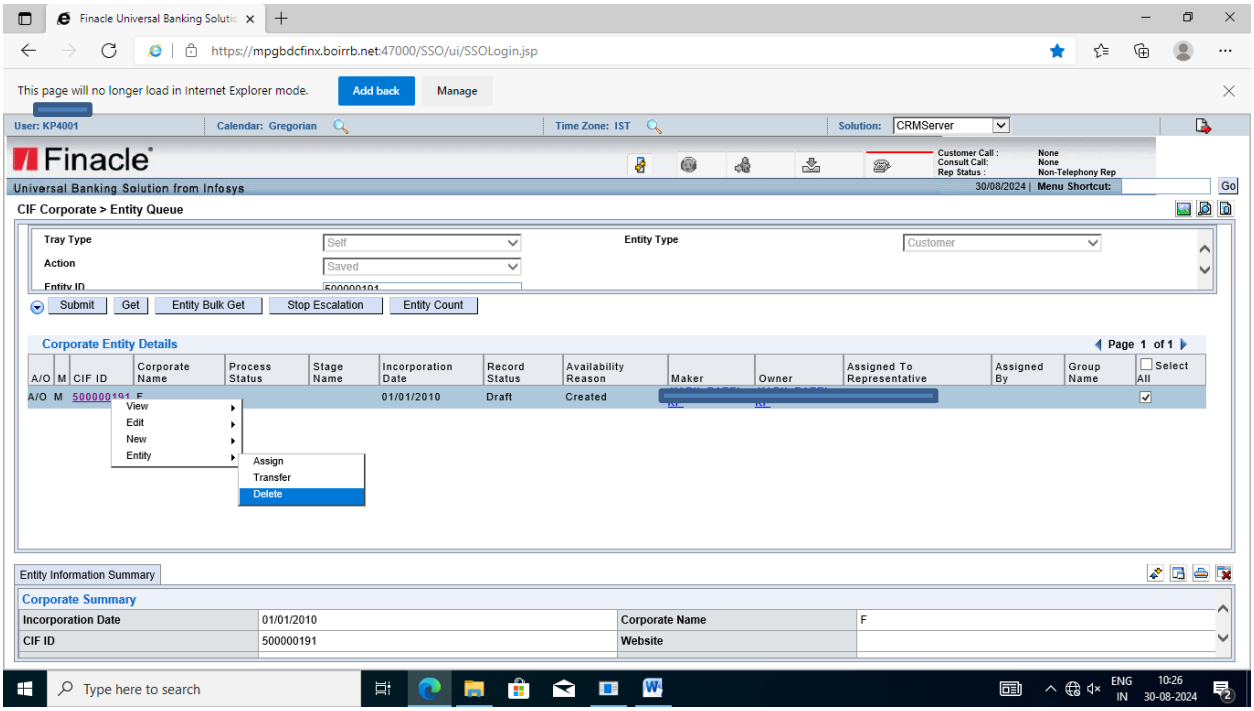
CLICK ON SAVE APPROVAL FORM




28- NOW THE CIF IS VERIFIED SUCCESSFULLY




- NOW LINK THE CIF TO CORE SERVER BY MENU "HCCFM"

DELETION

- If user want to cancel the modify cif or new cif which is in 'saved status'
"ENTITY QUEUE -> SELF TRAY "SELF" -> ACTION "SAVED" -> ENTITY ID (ENTER CIF ID) -> SUBMIT -> CLICK ON CHECK BOX-> RIGHT CLICK ON CIF -> ENTITY -> SELECT DELETE"