Journey of RM from Customer Meeting to Closure of Action Items

HSBS PWS

Document Version History

Date	Prepared By	Reviewer & Date of Review	Approver & Date of Approval	Version	Change Details
31 Aug 2022	Rahul Anand	Swati Raman 01 Aug 2022	Vinay Kumar 02 Aug 2022	1.0	Base Version
22 Apr 2024	Rahul Anand	Pavan Kallur 23 Apr 2024		1.1	Implementation Specific Changes

Distribution List

Team	Person

Table of Contents

1. Introduction

An RM can schedule a meeting with a prospective customer and existing customer. An RM can schedule a meeting for different purposes like:

1. RM schedules a meeting with a lead as a part of a campaign
2. RM schedules a meeting with a customer as a part of a service request
3. RM schedules a meeting with a customer for other reasons except campaign or service request

On scheduling a meeting, the RMs calendar is updated with the details of the meeting. The RM can also invite other RMs or other staff for the meeting. After meeting the customer, the RM files a call report in the system. A call report can be filed for every meeting scheduled. The RM can also file a standalone call report for situations where RM meets with the customer without scheduling a meeting in the system

2. Prerequisites

S No	Process	Reference Document
1	Linking prospect to customer	Journey of Lead to Prospect and Prospect to Customer
2	Prospect Onboarding	Journey of Lead to Prospect and Prospect to Customer
3	Lead Onboarding	Journey of Lead to Prospect and Prospect to Customer
4	Roles and User Maintenance	Journey of Defining Maintenance

3. Flow Diagram

Not Applicable

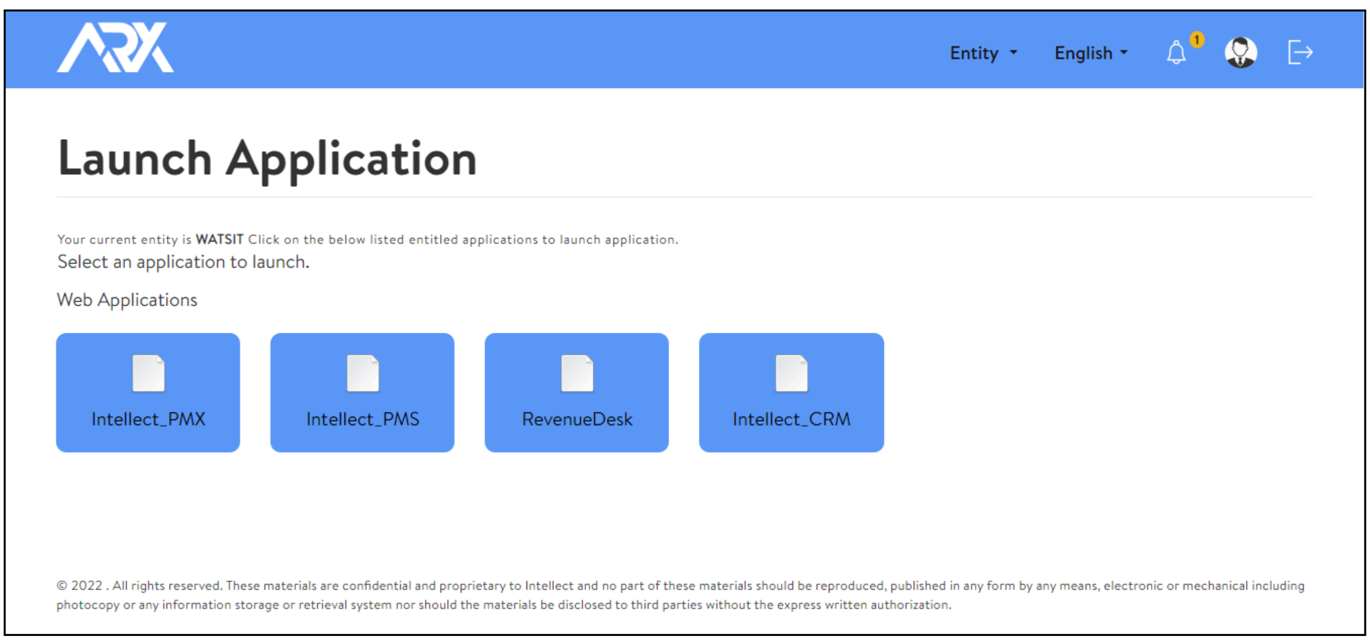
4. Process Description

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 “RM Office” to launch the PMS application

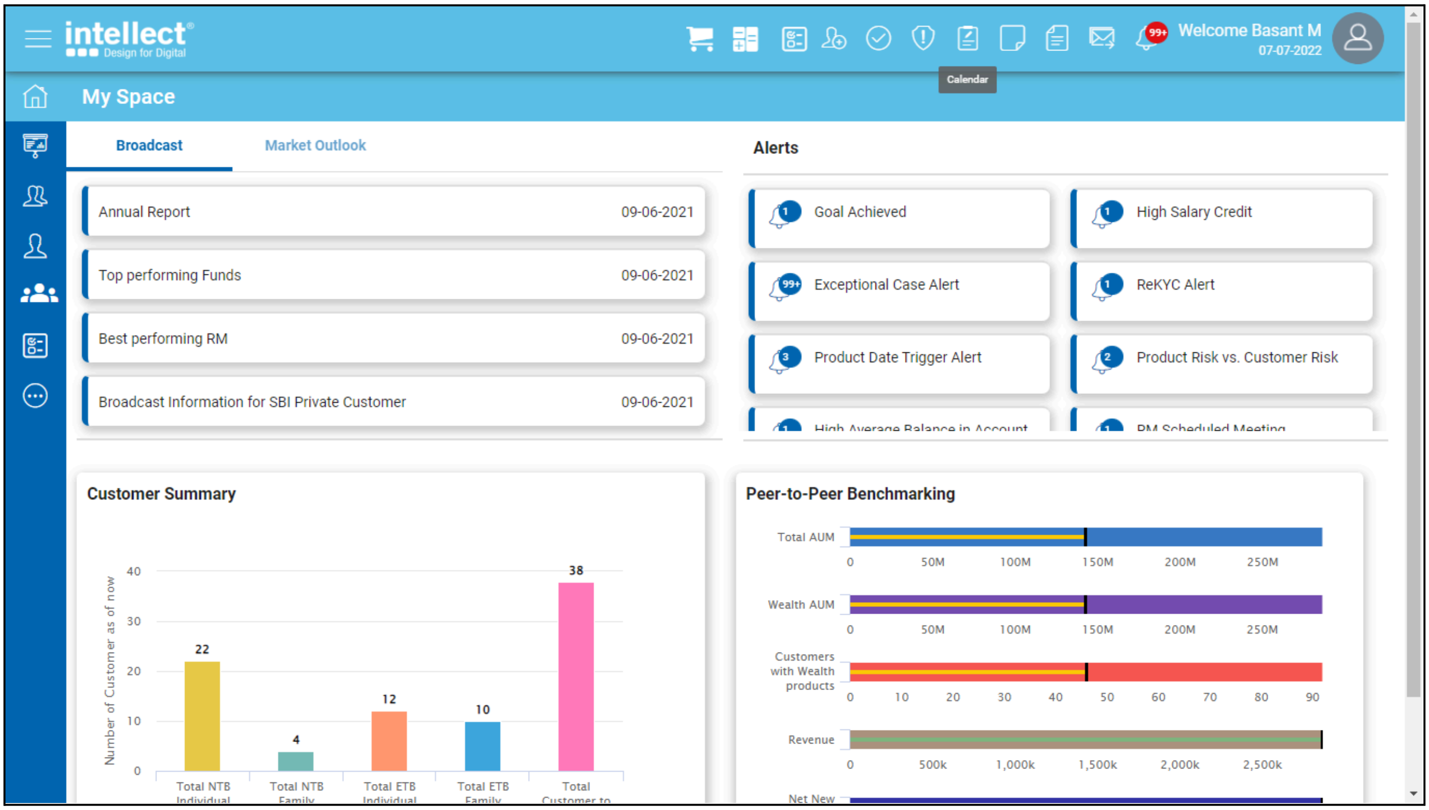


Screen: Select RM office

4.2 Schedule a Meeting

The objective of this user journey is to enable the user to schedule a meeting. User can schedule meeting and invite attendees to the meeting

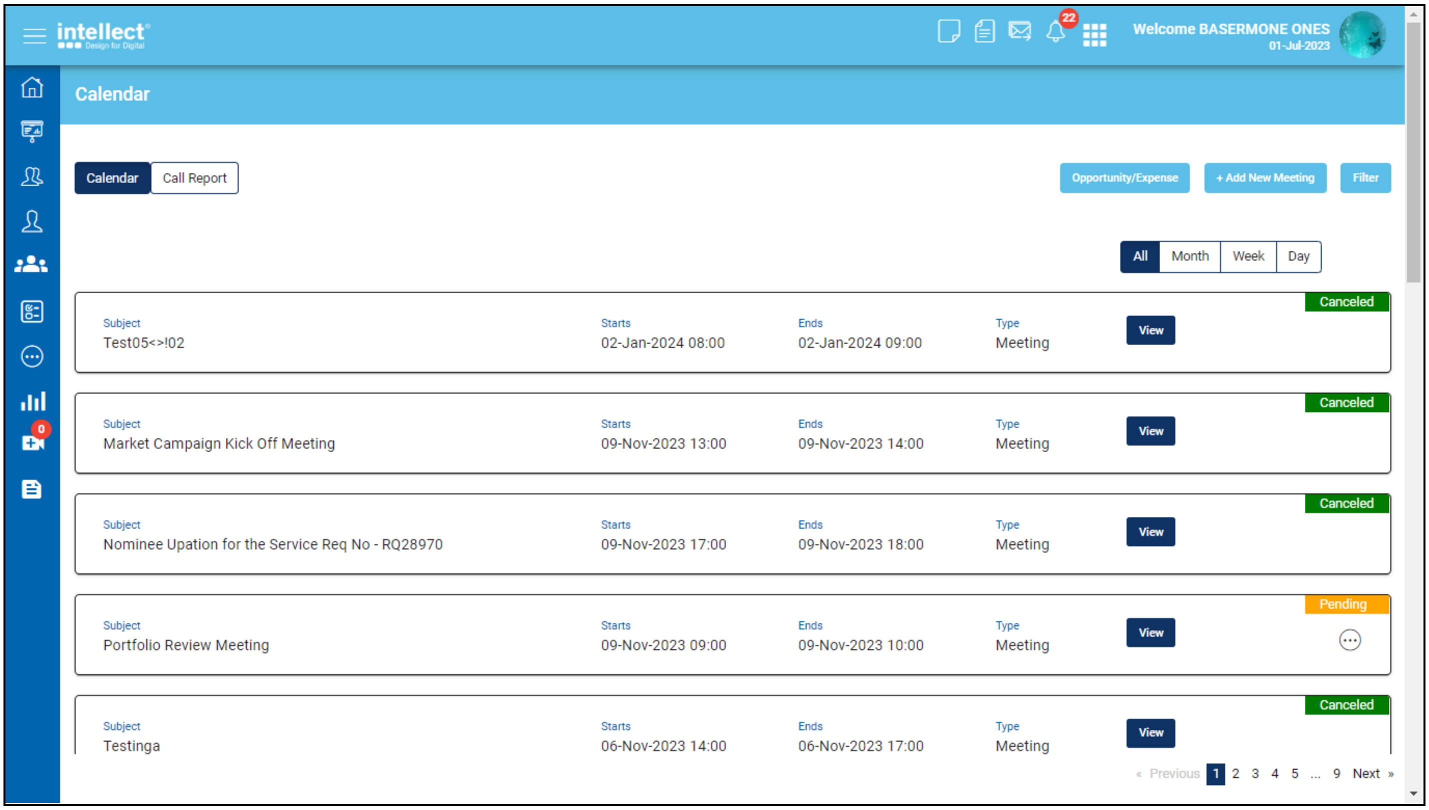
1. The User hovers and clicks on the "Calendar" widget on the top panel in My Space to navigate to the Calendar screen



Screen: Click on Calendar

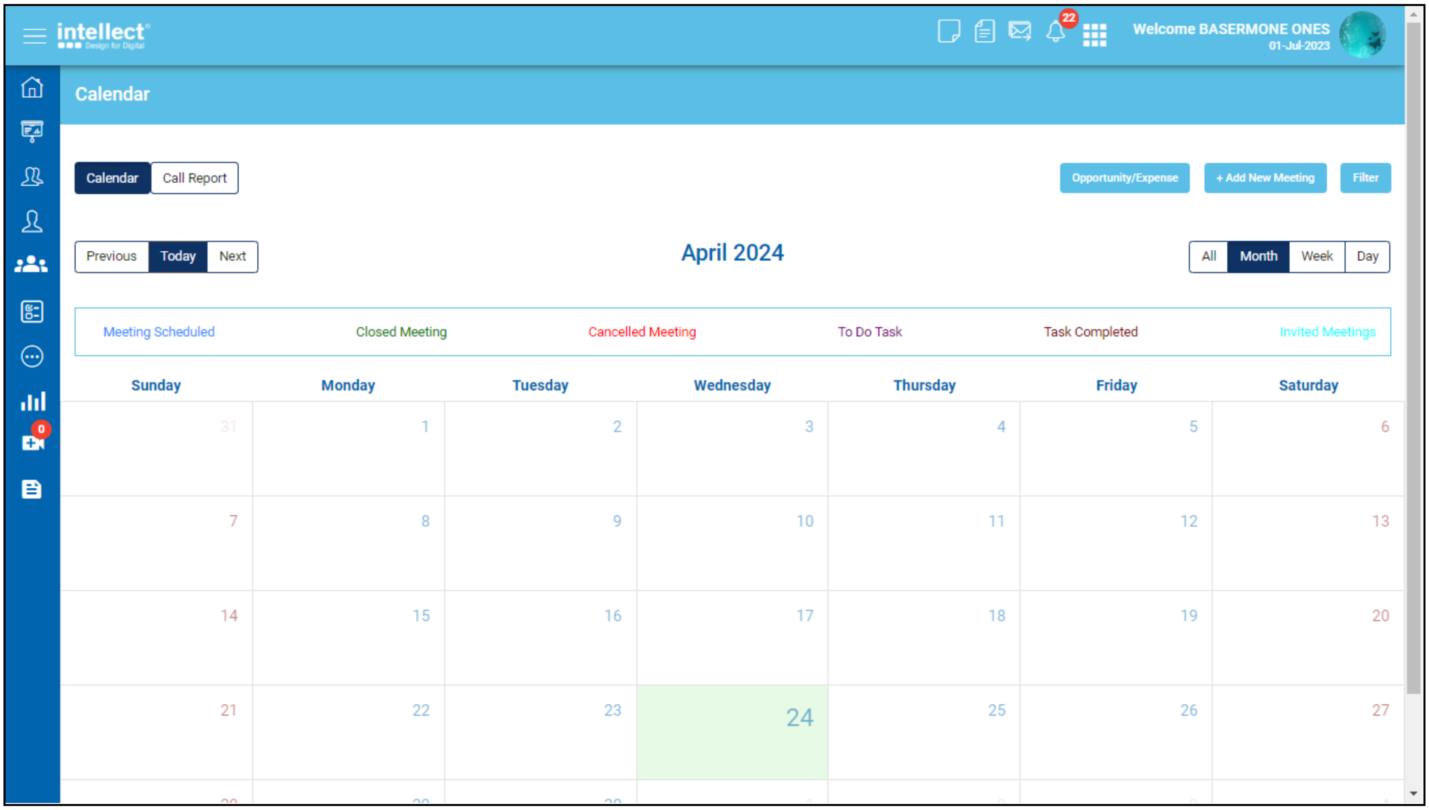
2. On the Calendar screen, the User can view their scheduled Meetings. The Default view is the Monthly view. However, they can customize the view as per their choice in the following ways:

   a. All – List of All scheduled meetings shown



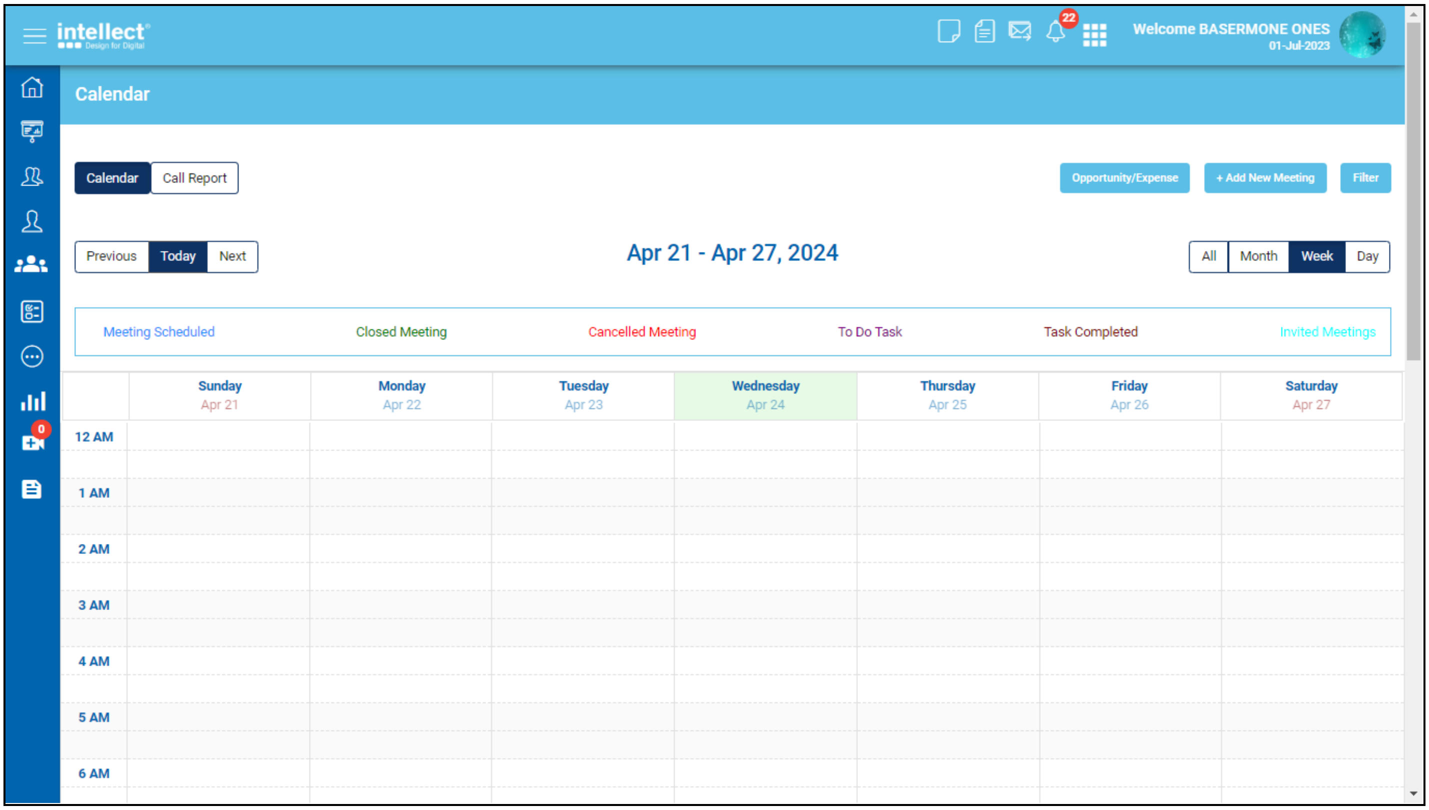
Screen: All Meetings View

b. Month – Scheduled Meetings for the Month are shown



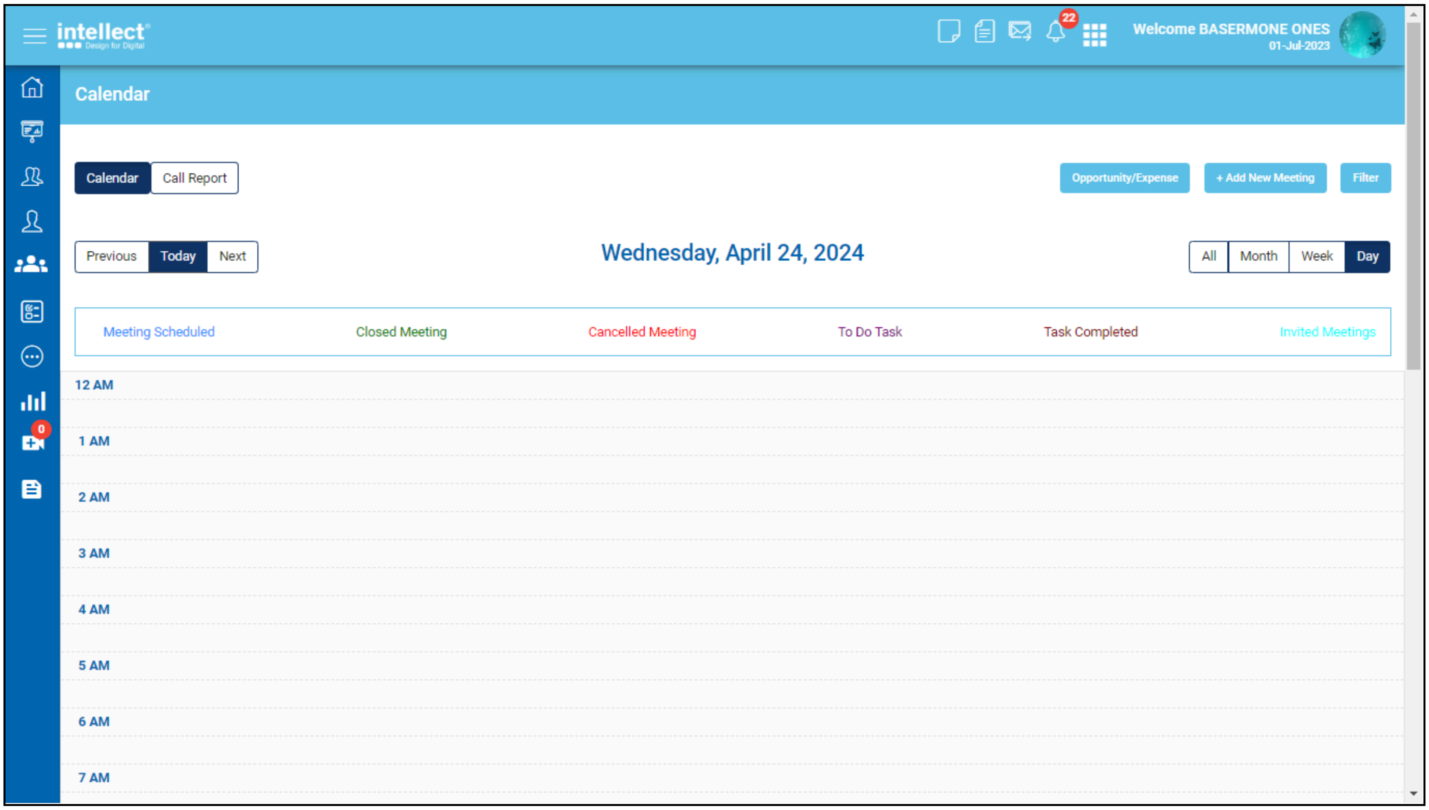
Screen: Monthly Meetings View

c. Week – Scheduled Meetings for the Week are shown



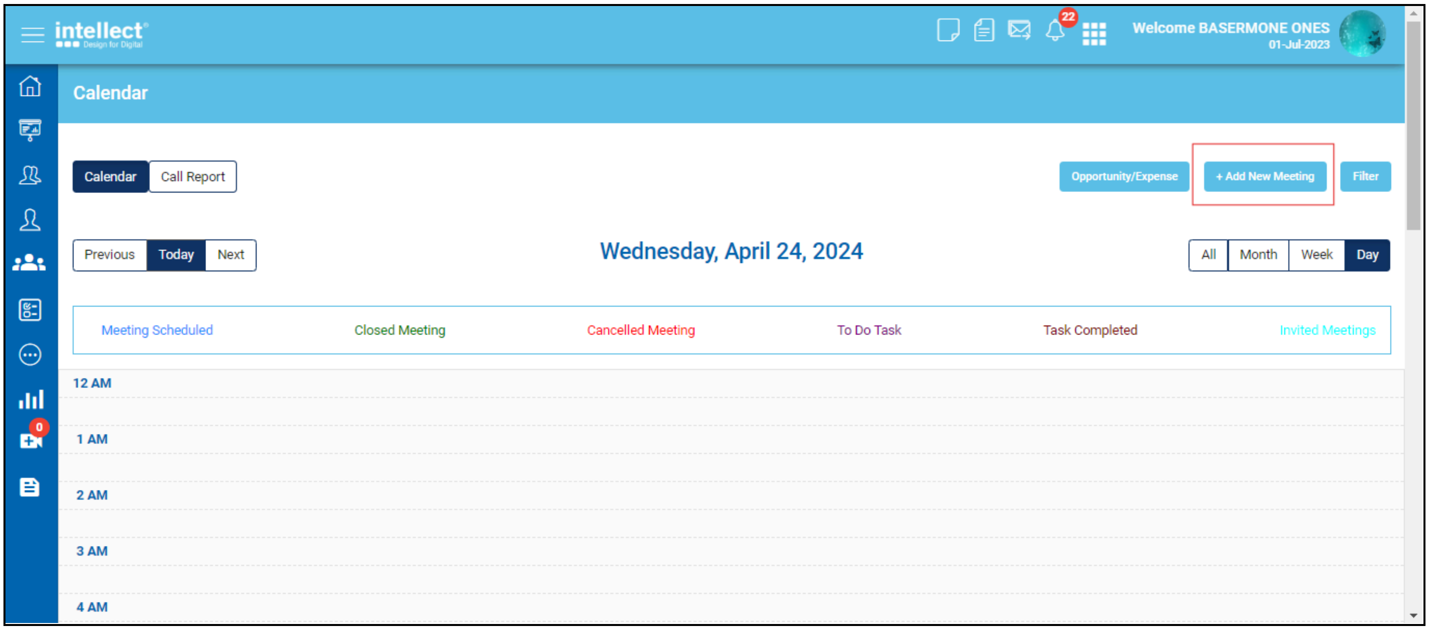
Screen: Weekly Meetings View

d. Day – Scheduled Meetings for the Day are shown



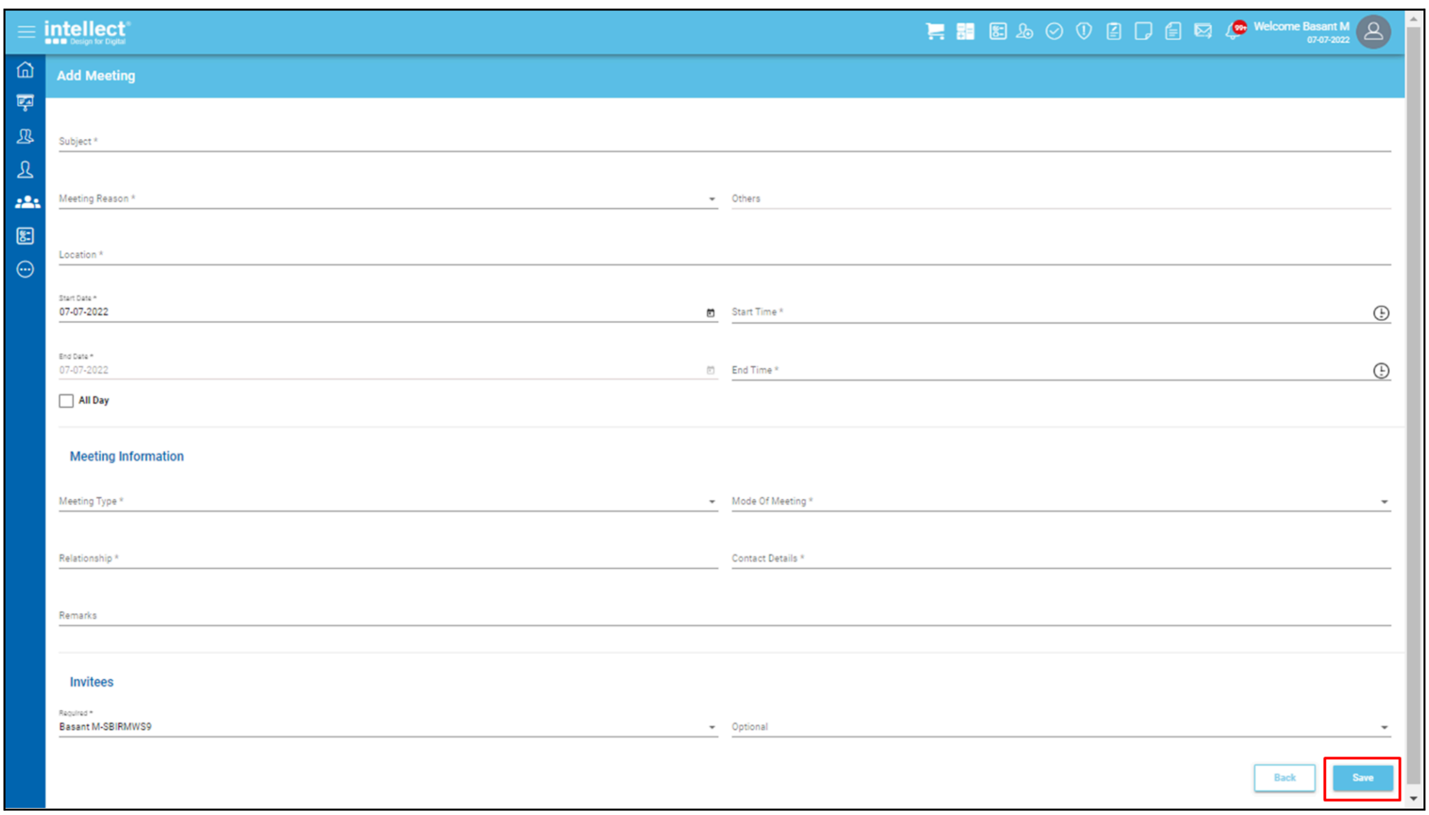
Screen: Day's Meetings View

3. Here, the User can perform the following actions:
    a. Call Report – File a Standalone Call Report for unscheduled meetings (refer section Standalone Call Report for details)
    b. Add New Meeting – Schedule a Meeting with the Customer/Lead/Prospect
4. The User then clicks on the "Add New Meeting" button to navigate to the Add Meeting Screen

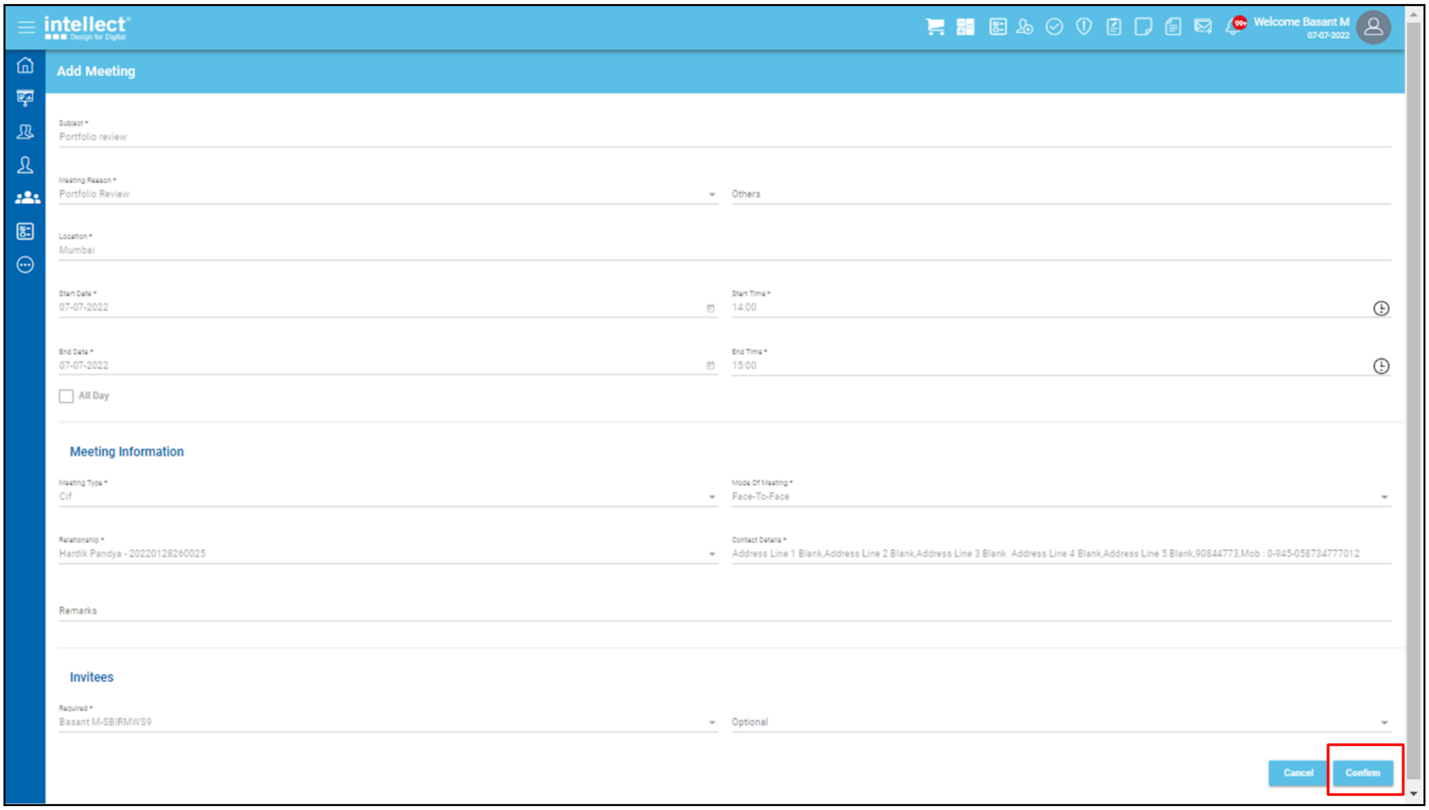


Screen: Click on Add New Meeting

5. On the Add Meeting Screen, the User can fill in the relevant details, including Meeting Information and Invitees, and click on the “Save” and then “Confirm” buttons to successfully schedule the Meeting

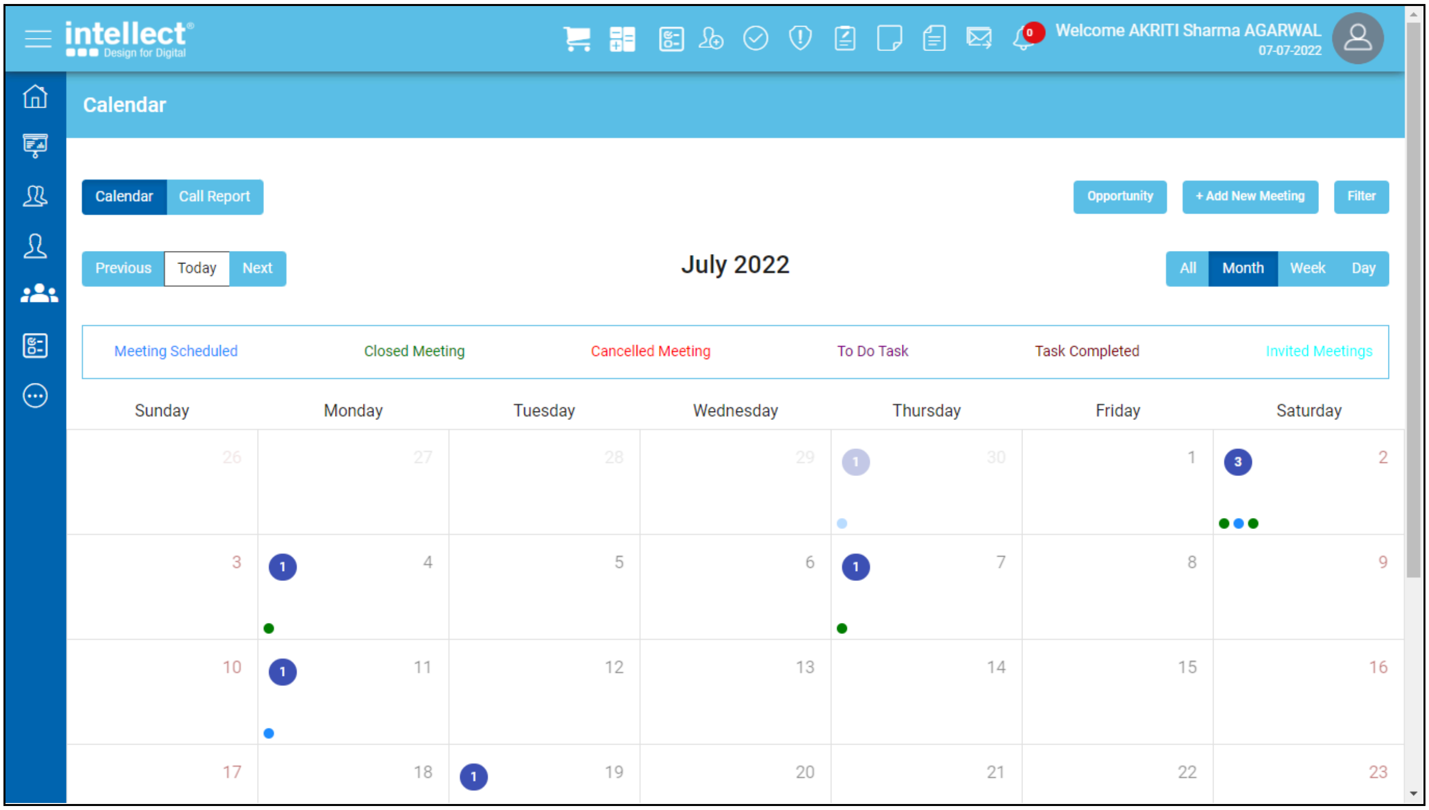


Screen: Click on Save



Screen: Click on Confirm

6. The scheduled meeting is now added to the User's calendar and the same can be viewed in the calendar



Screen: Meeting added to the Calendar

4.3 Call Report

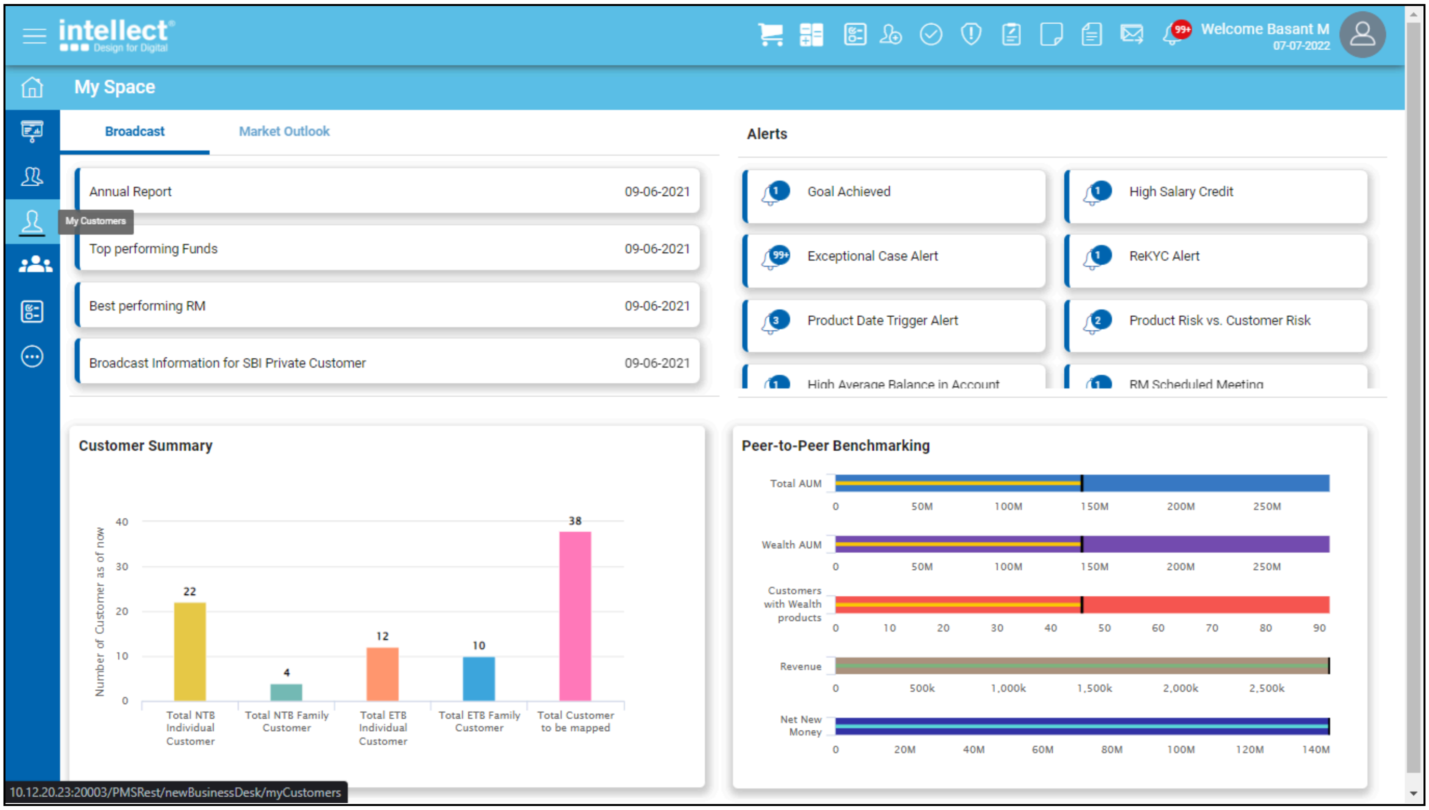
Call Report is a tool used by the Relationship Manager to keep track of all customer interactions. The Importance of call report management is as follows:

a. Call Reports help Relationship Managers to make note of customer needs and address them accordingly in a timely manner
b. Call Reports play a very important role when customers are handed over to a new Relationship Manager. These act as a base for the incoming relationship manager to understand the past history of interaction that the customer has had with the out-going relationship manager. Thus, it helps to avoid reaching out to the same customer again for gathering information
c. Call Report assists team leads of relationship managers to evaluate their subordinates. Managers can keep a track of the activities done by the subordinates on a day to day basis. It can also help to measure the productivity of an RM

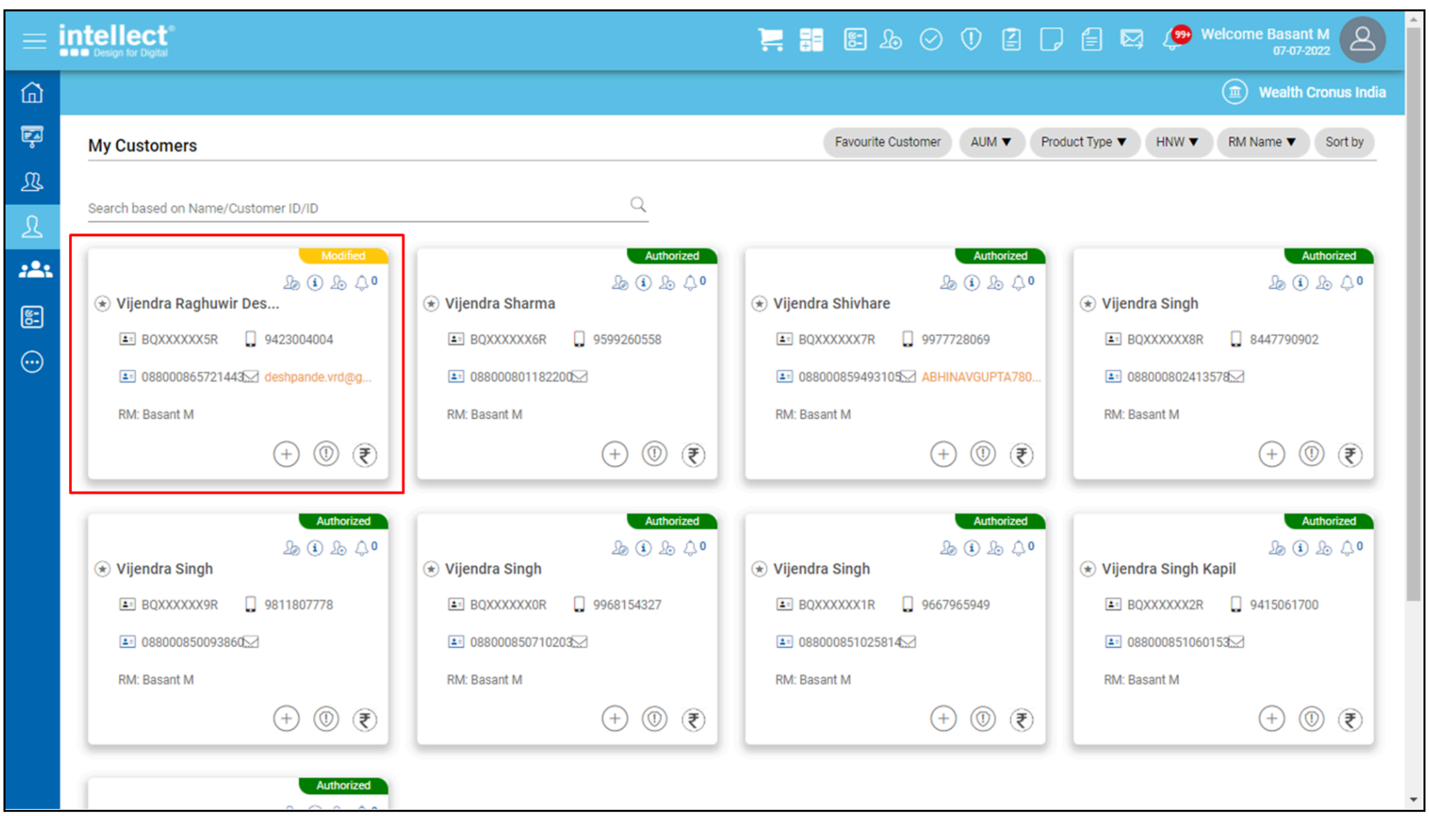
d. Notes present in the Call Reports can act as a source of data to formulate new products and services

4.3.1 Filing a Call Report

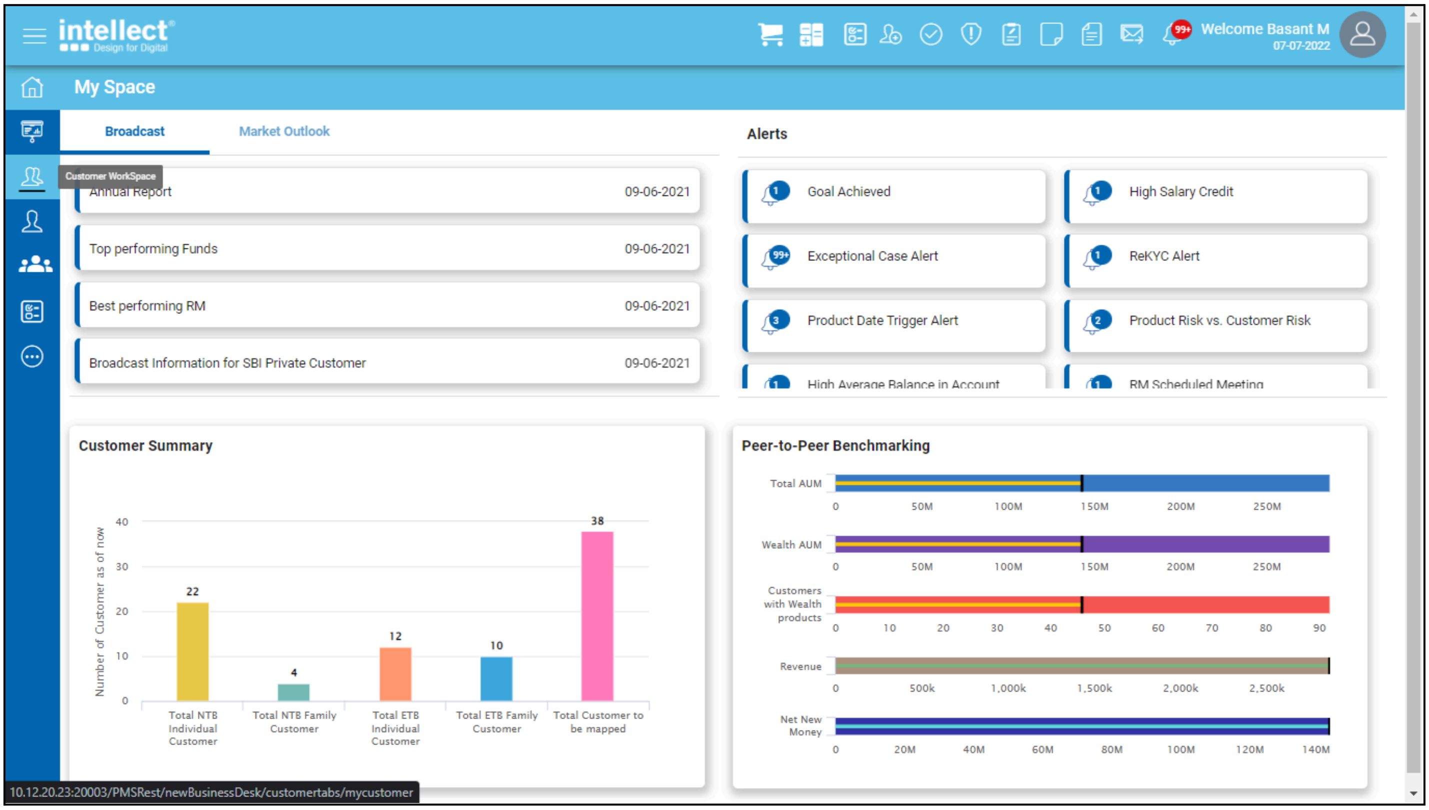
1. After logging into RM Office, the User can click on the “My Customers” widget on the left panel to view the customer card for all their customers. Alternatively, in case the User wants to view a specific customer’s card, they can click on the “Customer Workspace” widget on the left hand panel, and search for the specific customer in the search bar to view the customer card



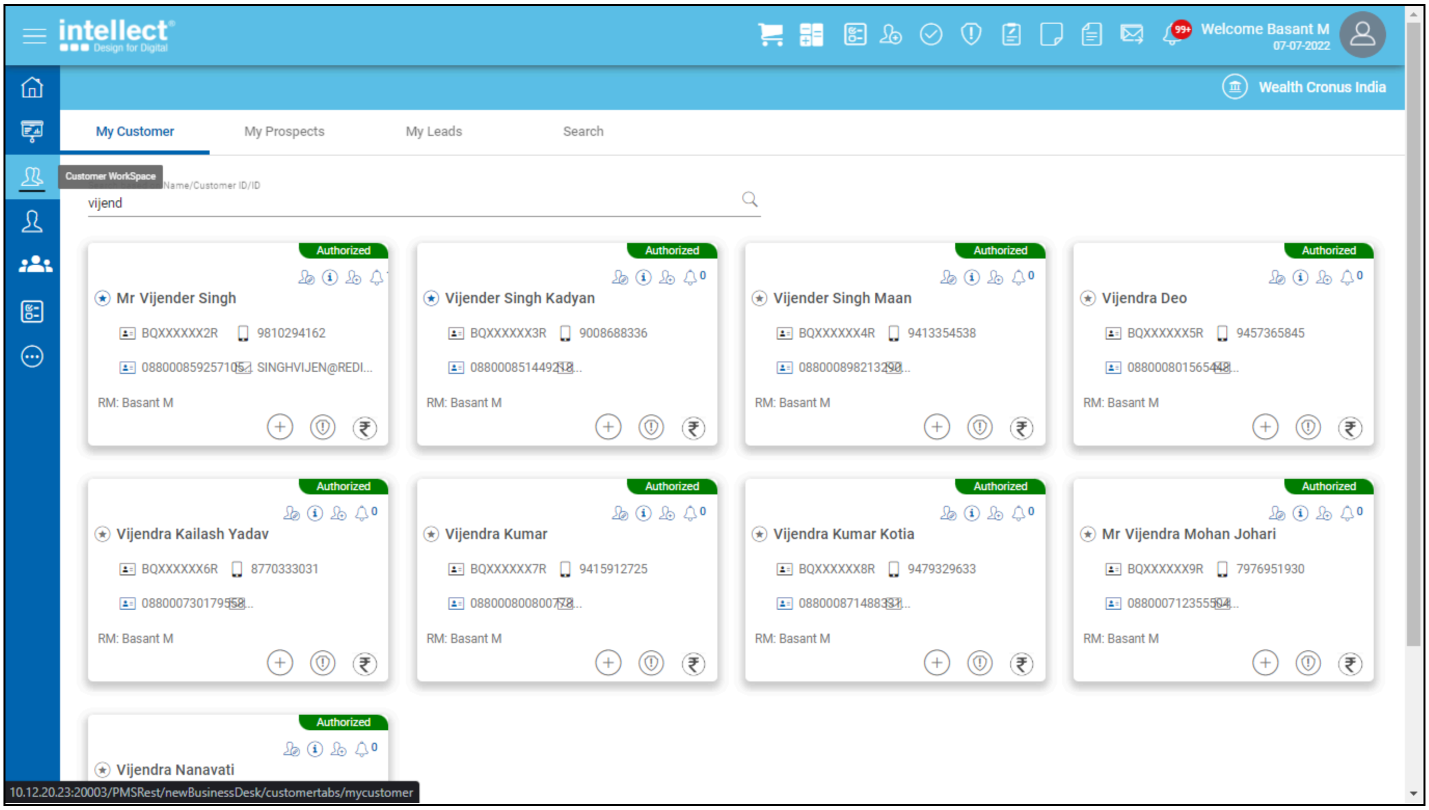
Screen: Click on My Customers



Screen: Click on the desired customer card

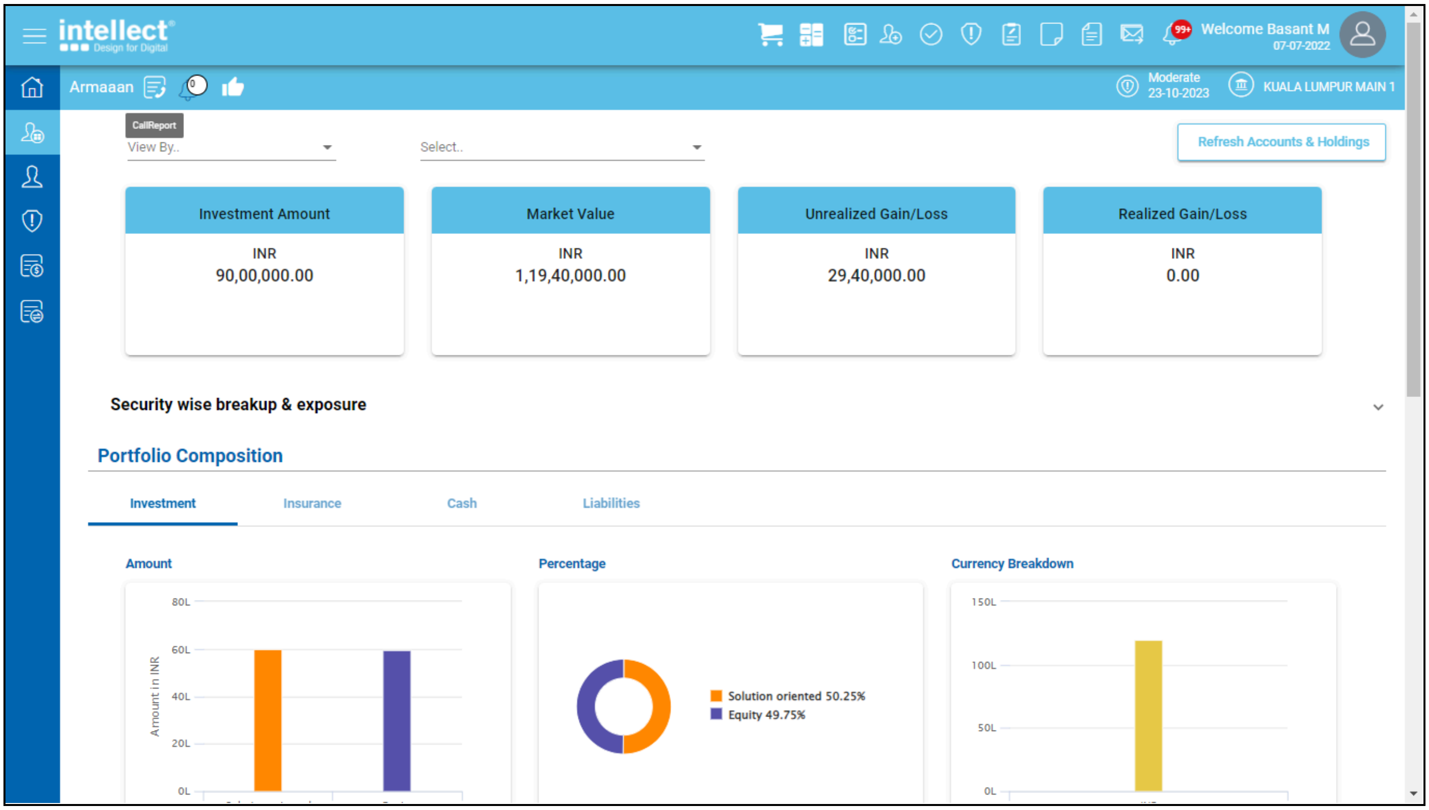


Screen: Click on Customer Workspace



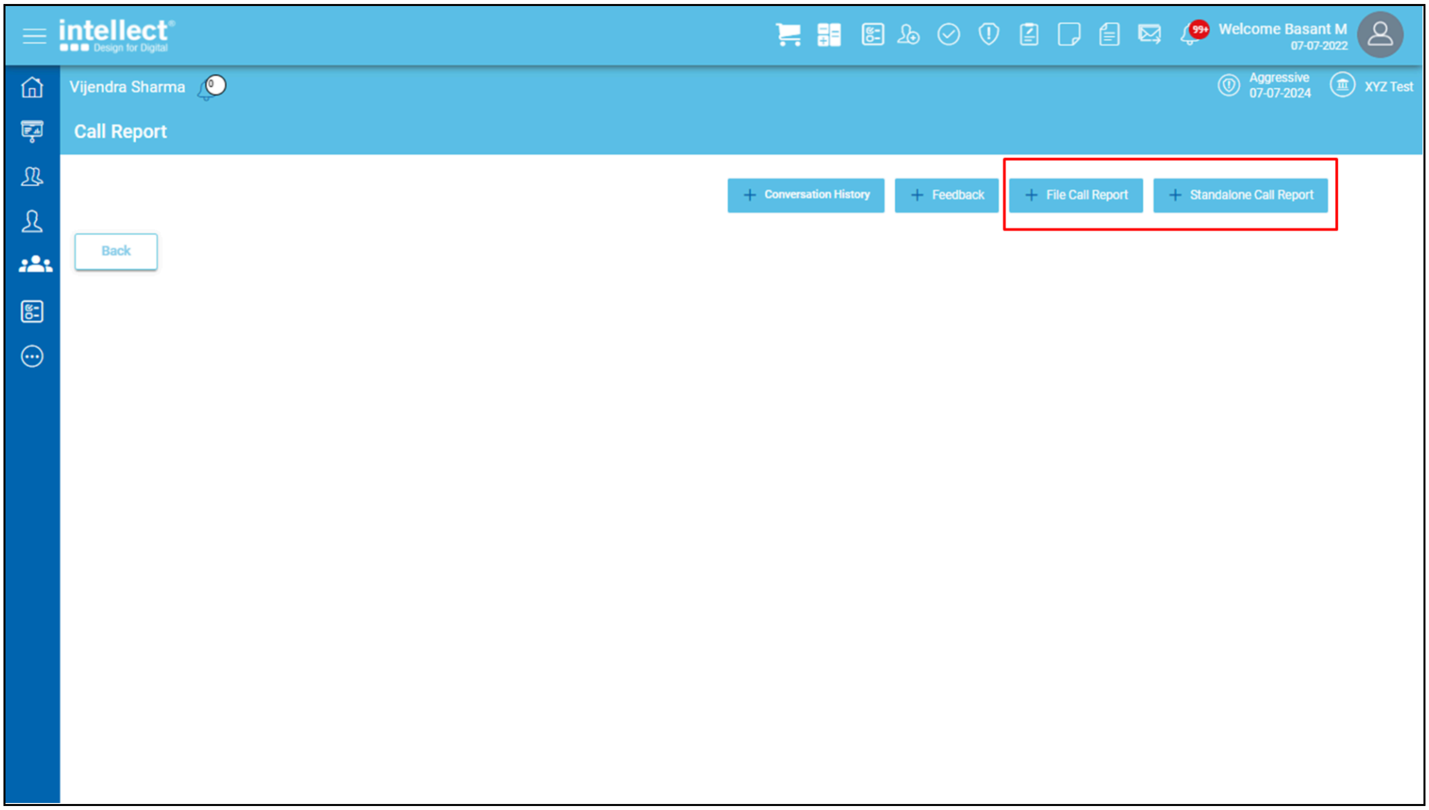
Screen: Search for Customer and Click on Customer card

2. On clicking the customer card, the system navigates the User to the Customer Dashboard. Here, the User can click on the icon in the top panel to navigate to the Call Report screen



Screen: Click on the Call Report widget

3. On the Call Report screen, the User can file 2 types of call reports:
    a. File Call Report – File a Call Report for a scheduled meeting
    b. Standalone Call Report – File an Ad Hoc Call Report (where meeting wasn't scheduled)

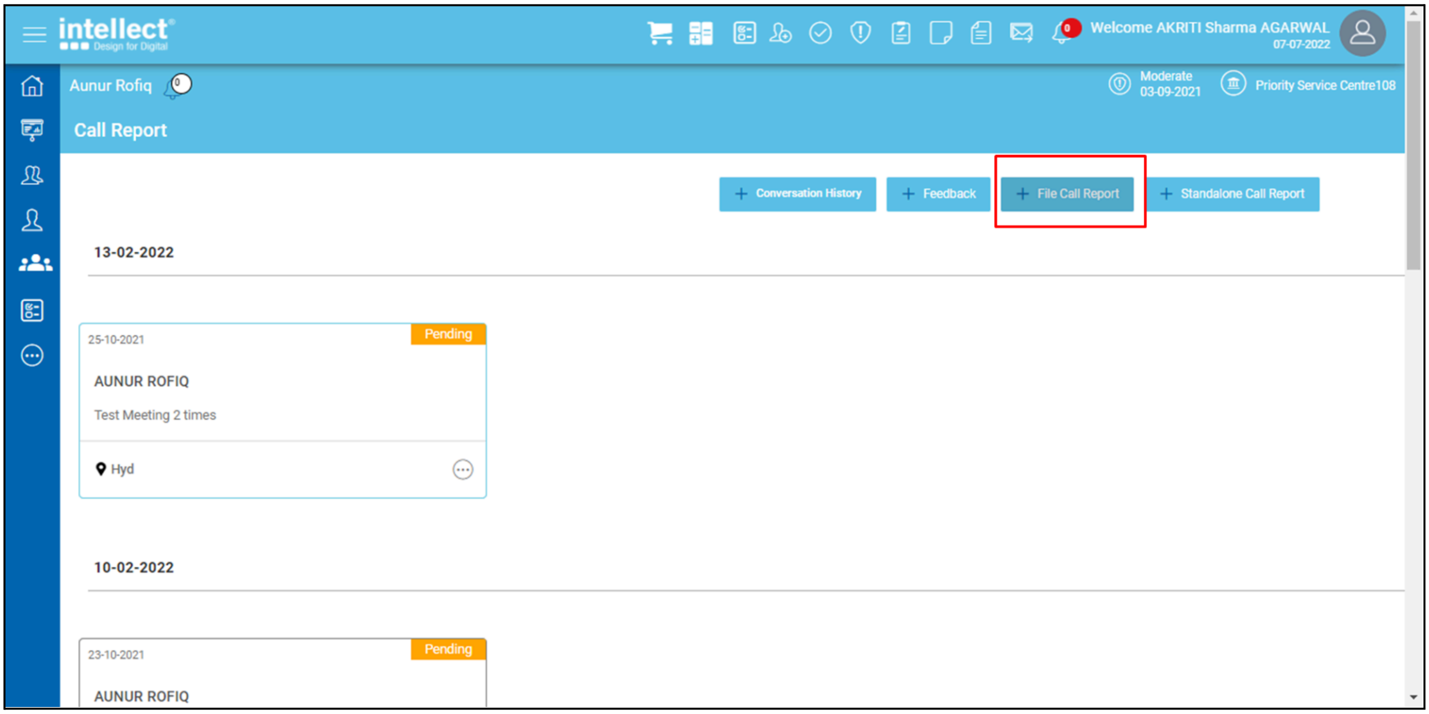


Screen: File Call Report and Standalone Call Report

4.3.2. File Call Report

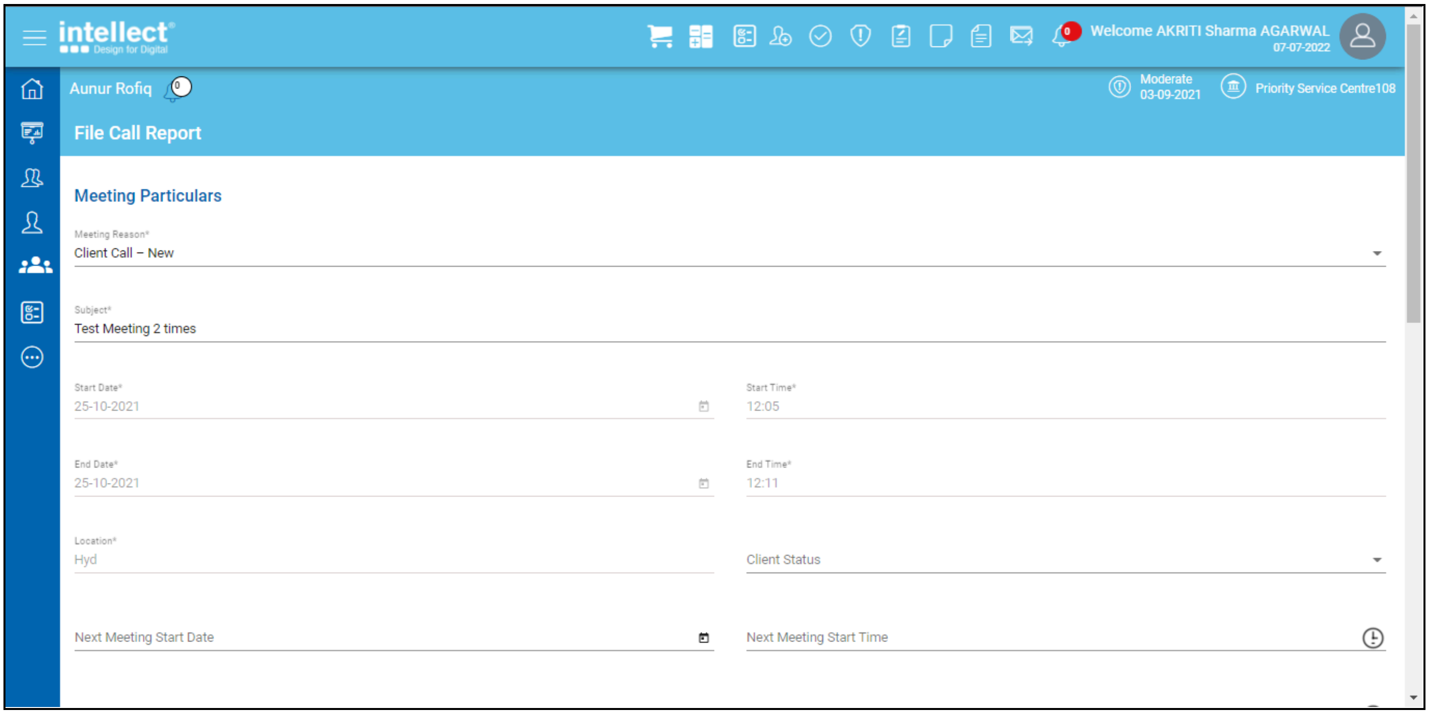
The User can use “File Call Report” menu to file a Call Report for a previously scheduled meeting

1. On the Call Report screen, the User selects a record with status “Pending” to file a call report (by clicking on the meeting card) and then clicking on the “File Call Report” button to navigate to the File Call Report screen



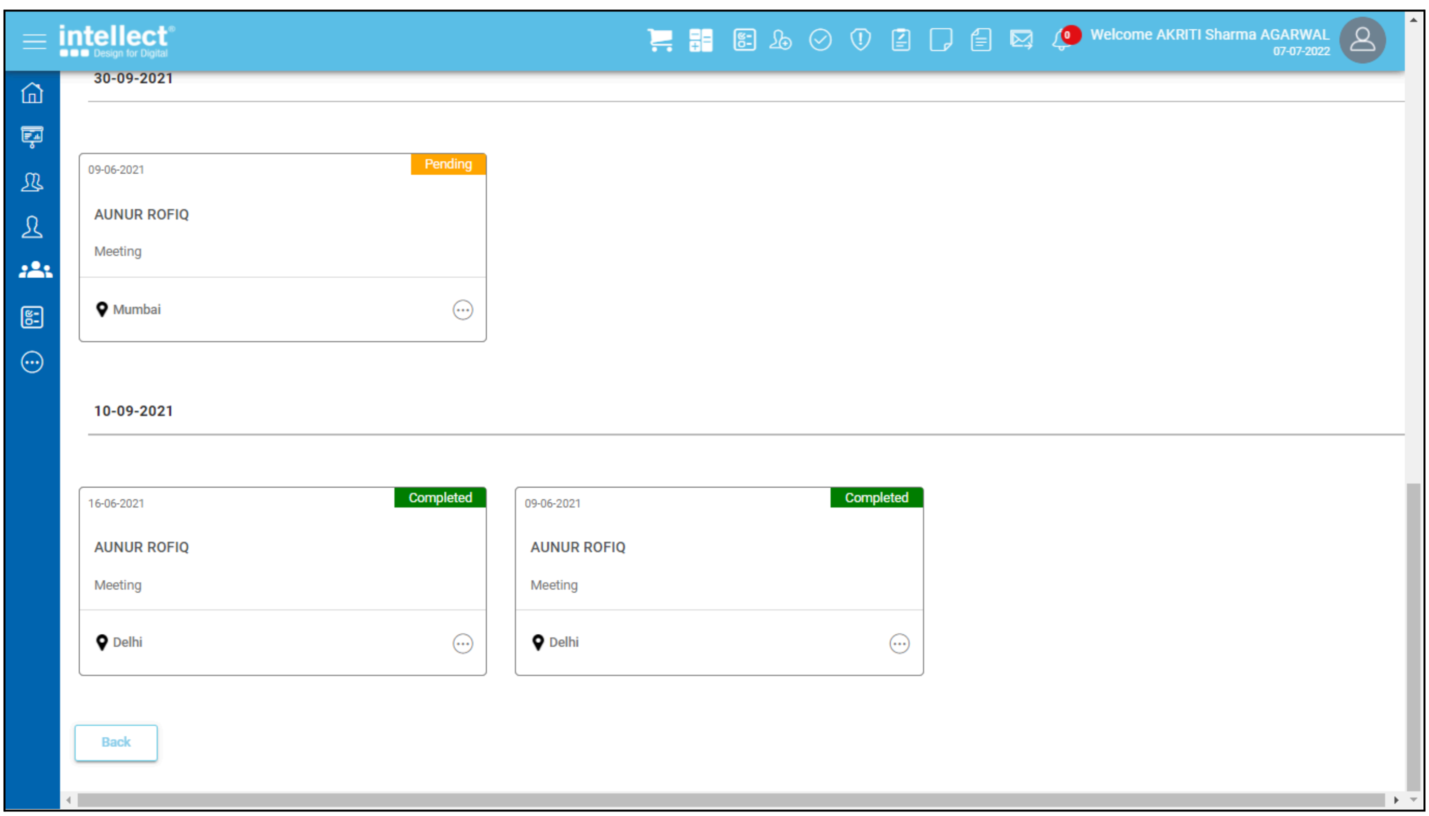
Screen: Select Pending Meeting and click on File Call Report

2. In the File Call Report screen, the User fills up all the relevant details in the Meeting Particulars and Meeting Information sections, and then clicks on the “Save” and “Confirm” buttons to file the call report



Screen: Click on Save

3. The call report is now successfully filed, and the User can see that the meeting status on the meeting card is updated to “Completed”



Screen: Call Report successfully filed and meeting status updated

4.3.3. Standalone Call Report

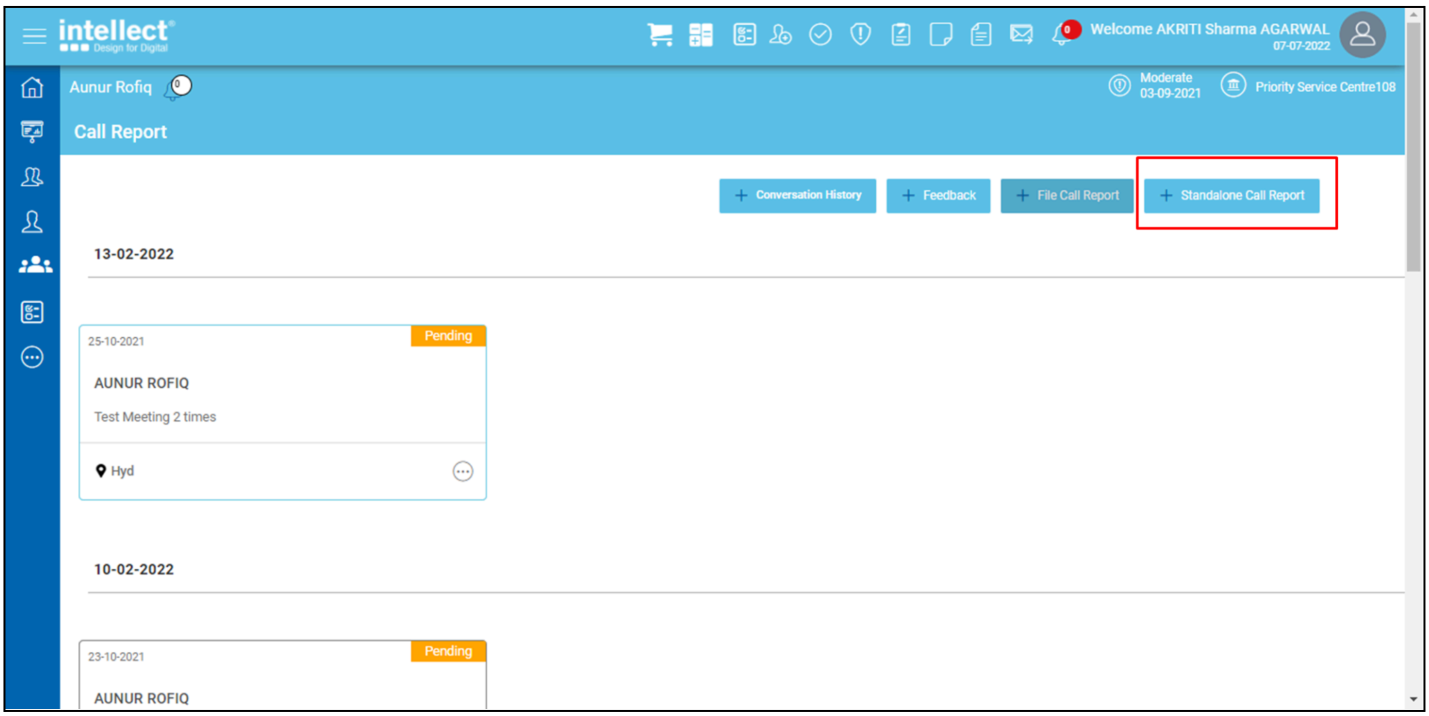
The User can file Standalone Call Reports for unscheduled meetings from two paths:

a. Customer Dashboard > Call Report Screen

b. Calendar Screen

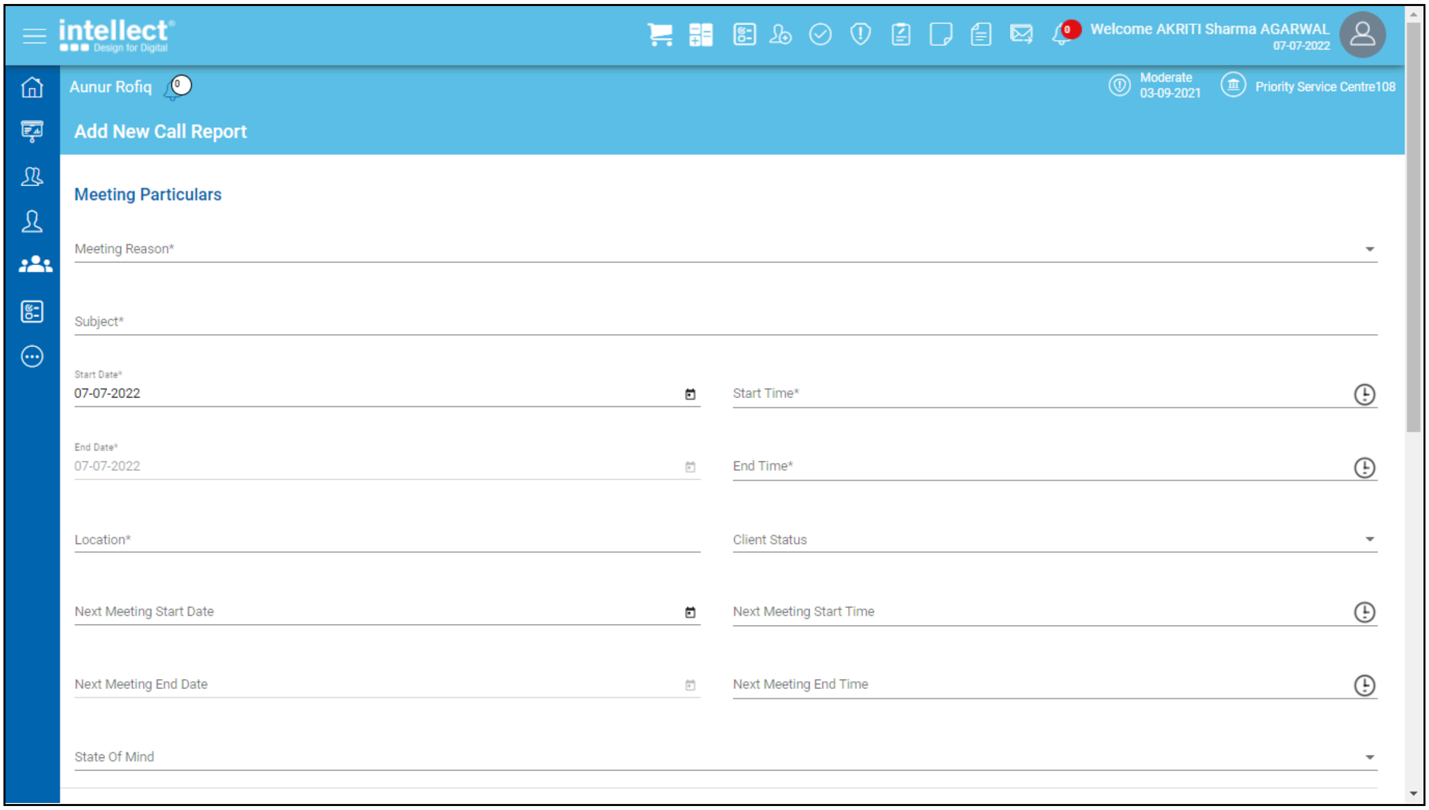
4.3.3.1. Standalone Call Report (From Customer Dashboard)

1. On the Call Report screen, the User clicks on the “Standalone Call Report” button to navigate to the Add New Call Report screen



Screen: Click on Standalone Call Report

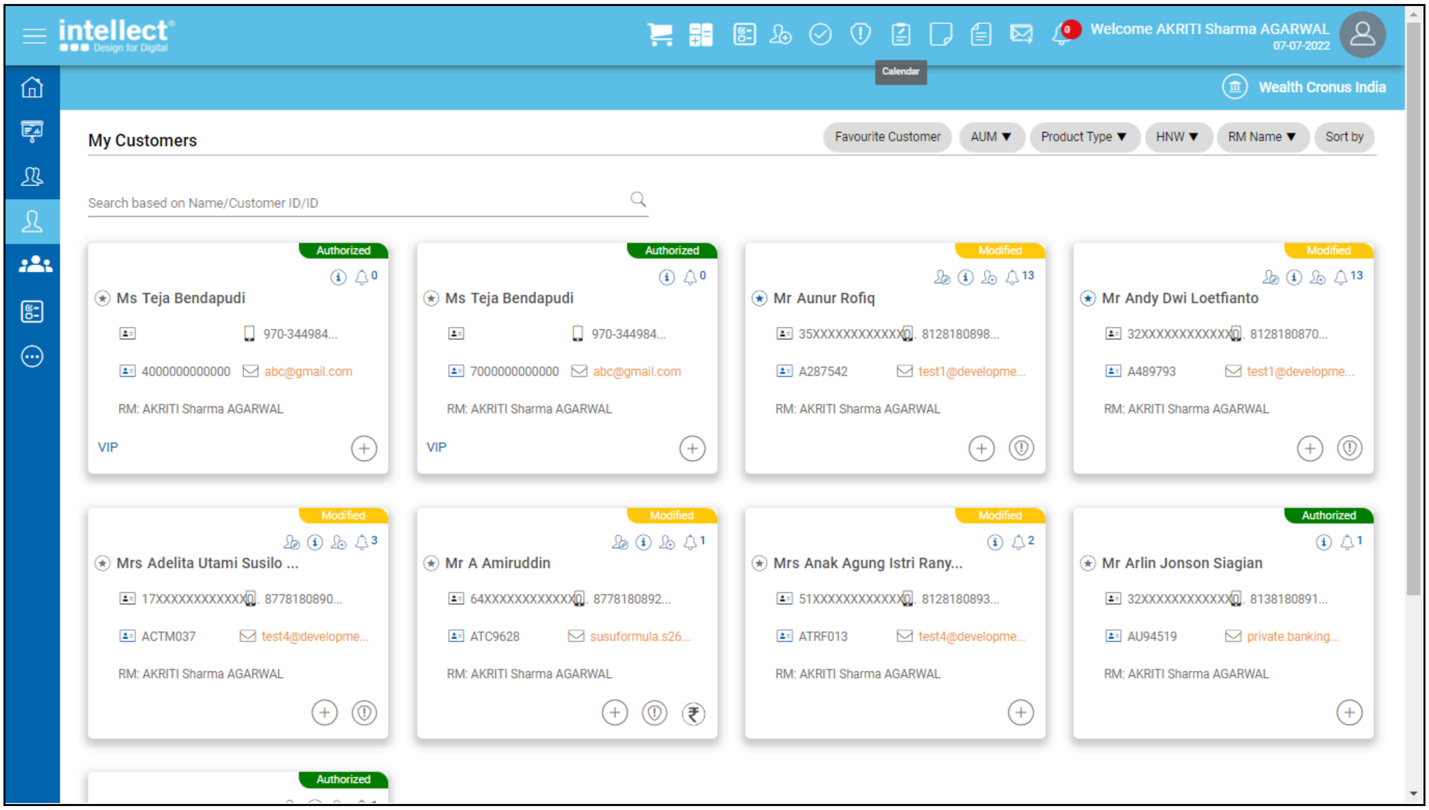
2. In the File Call Report screen, the User fills up all the relevant details in the Meeting Particulars and Meeting Information sections, and then clicks on the “Save” and “Confirm” buttons to file the standalone call report



Screen: File Standalone Call Report

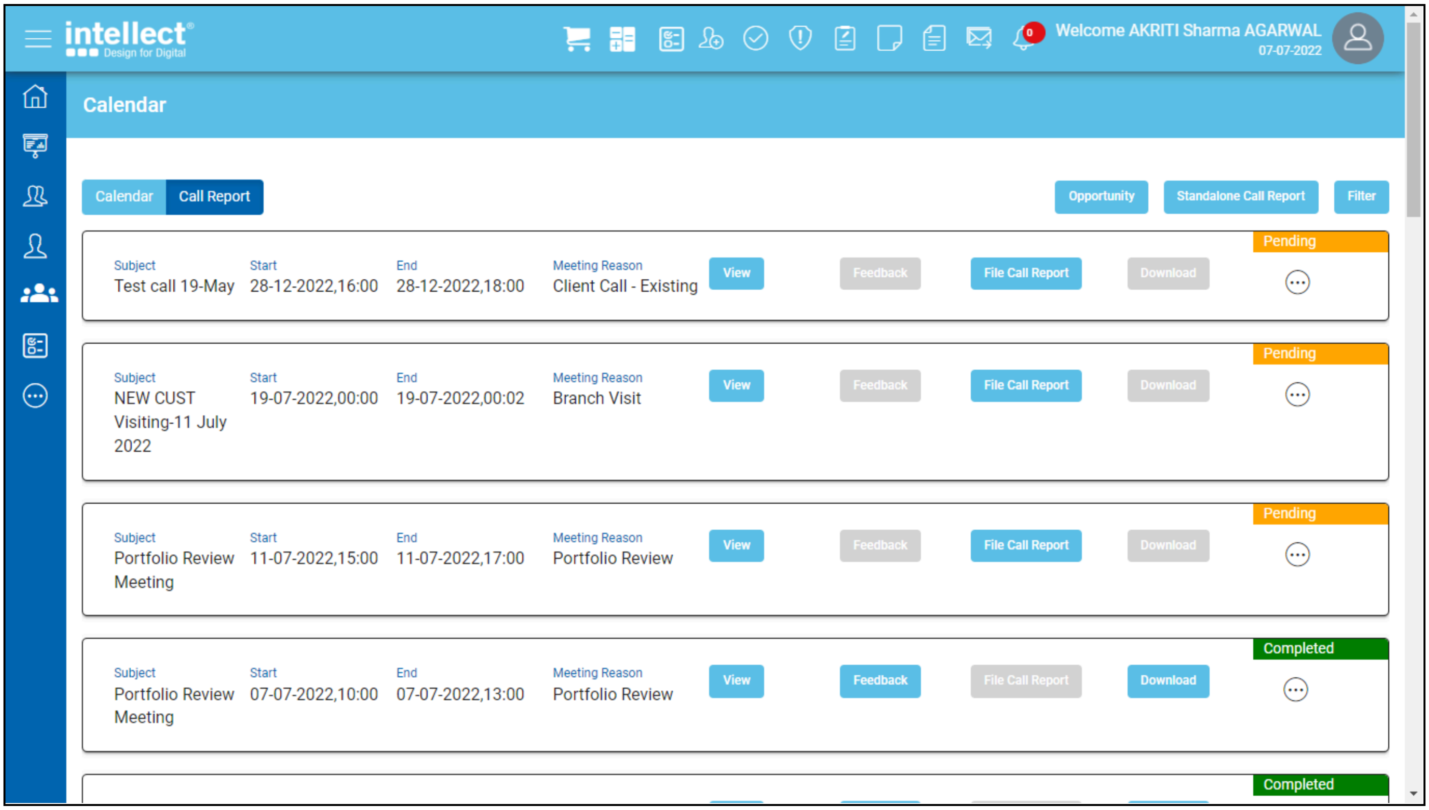
4.3.3.2. Standalone Call Report (From Calendar)

1. The User hovers over and clicks on the “Calendar” widget on the top panel in My Space to navigate to the Calendar screen



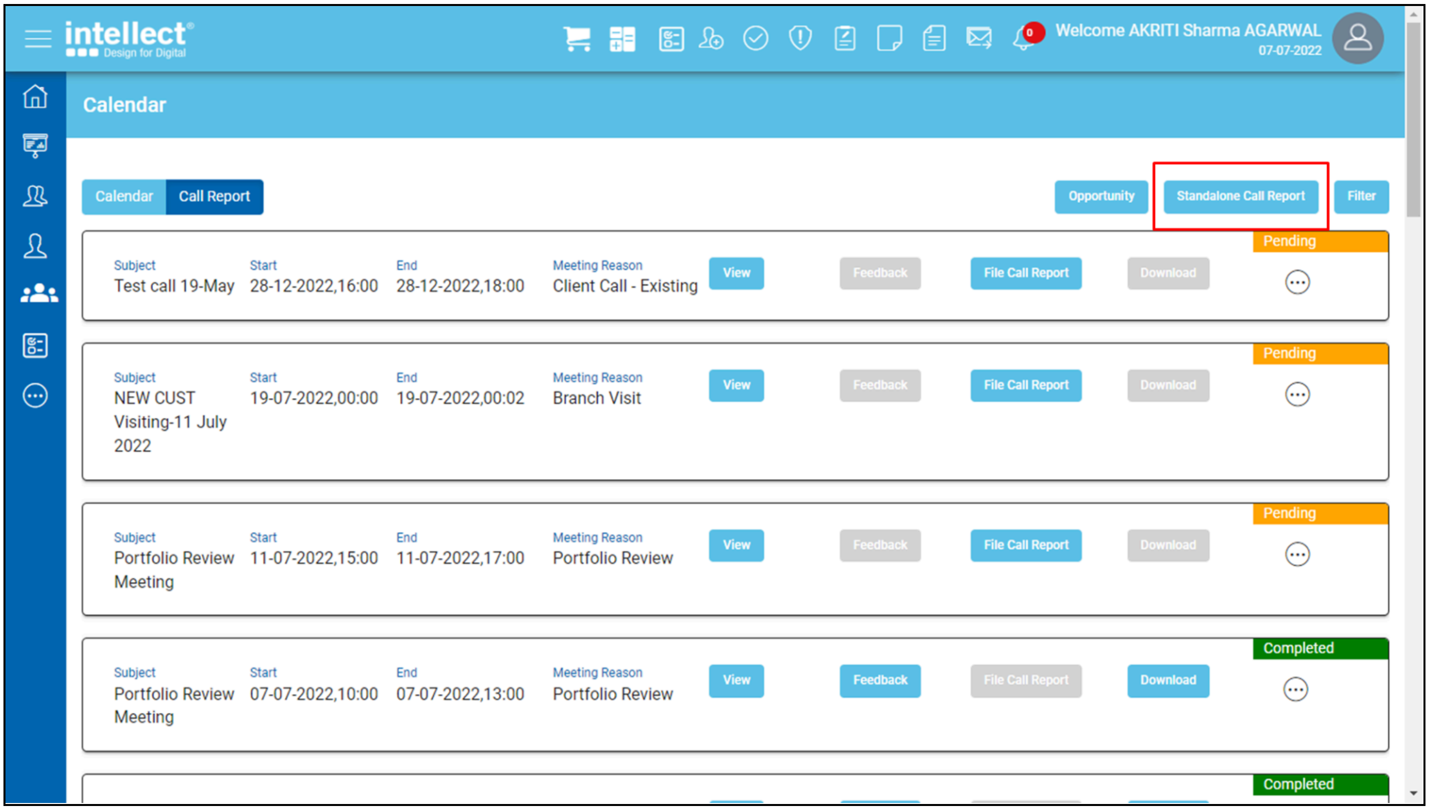
Screen: Click on Calendar

2. The User clicks on the “Call Report” to file the call report for the unscheduled meetings



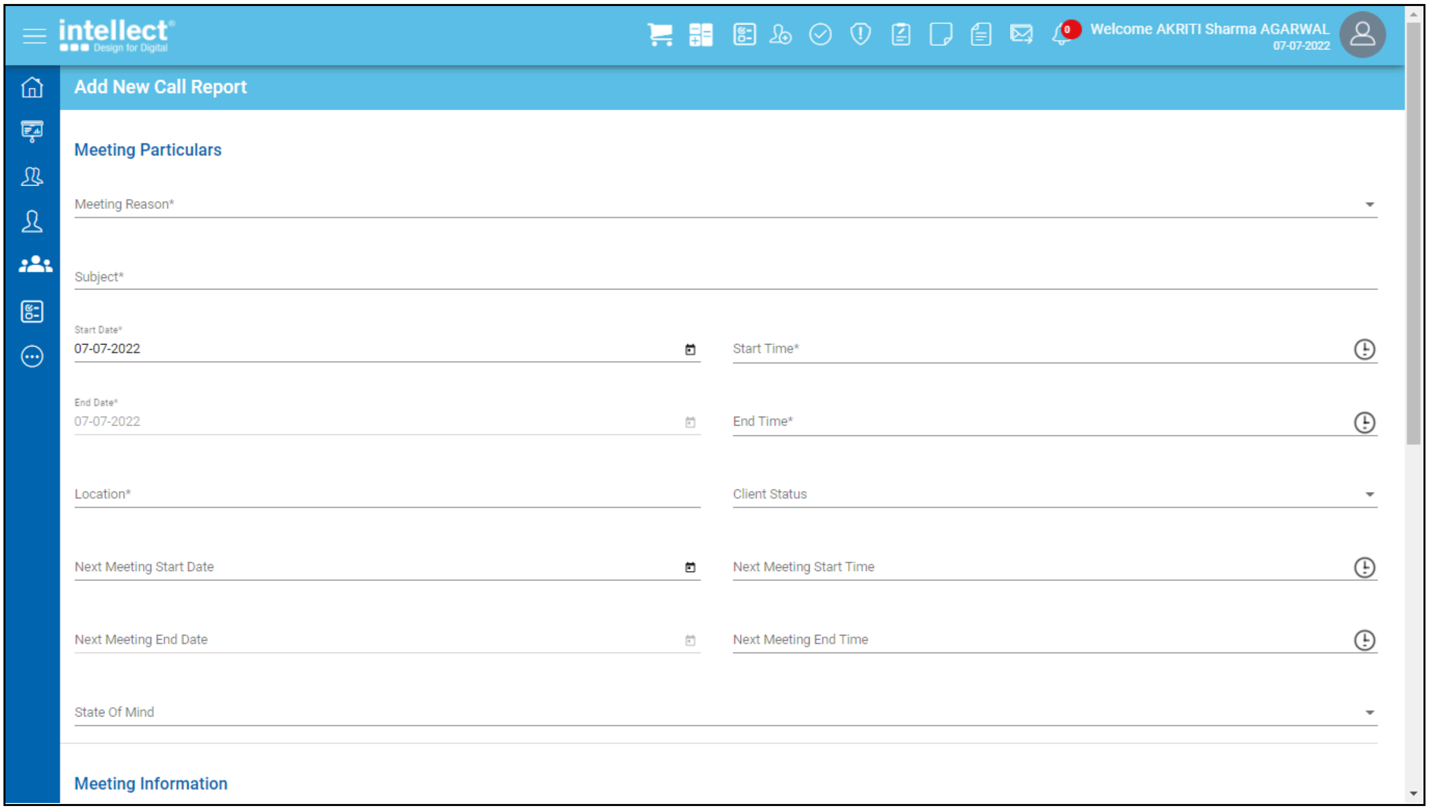
Screen: Click on Call Report

3. User clicks on the “Standalone Call Report” to file the call report for the unscheduled meetings. In the Call Report Screen, the user can view, give feedback, and file call report



Screen: Click on Standalone Call Report

4. In the File Call Report screen, the User fills up all the relevant details in the Meeting Particulars and Meeting Information sections, and then clicks on the “Save” and “Confirm” buttons to file the standalone call report



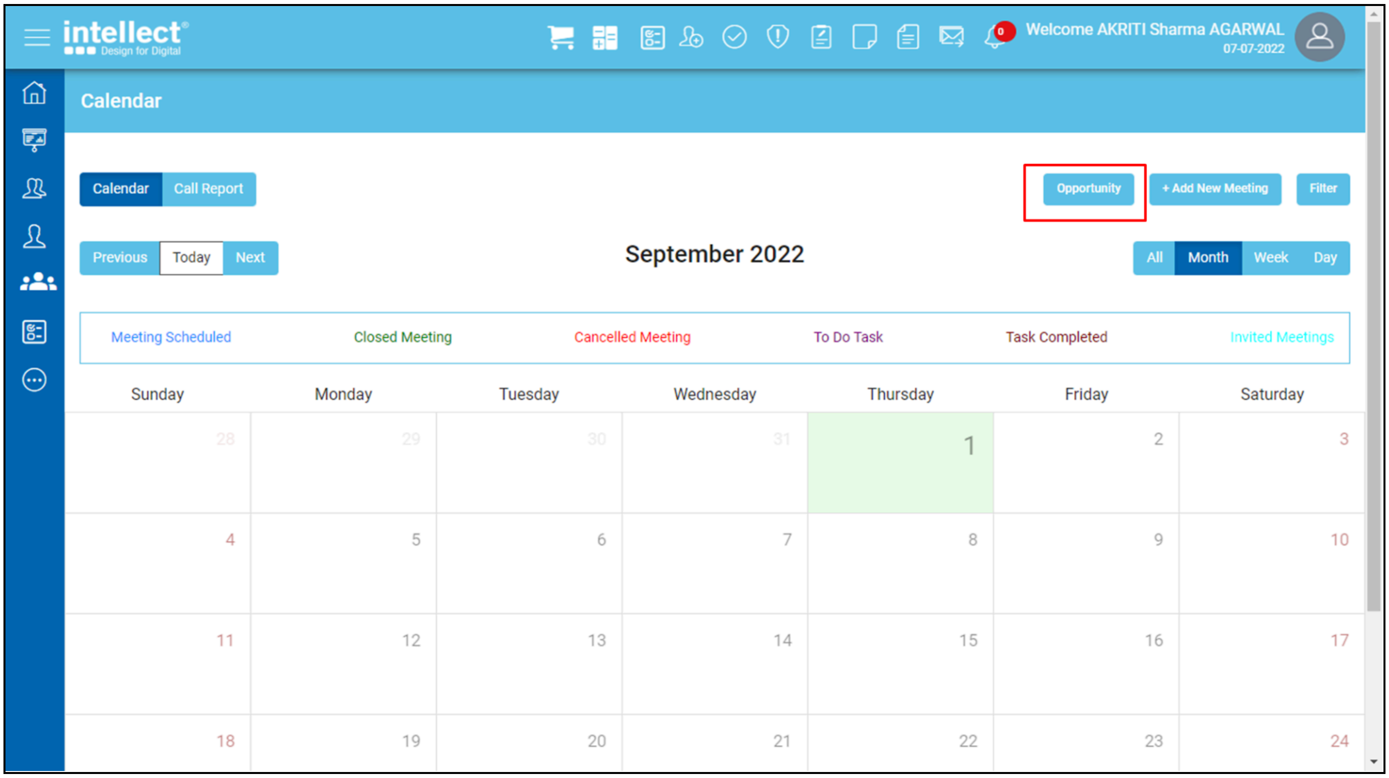
Screen: File Standalone Call Report

4.4. Opportunity

A RM schedules meetings with his/her customer or prospective customer to assess the potential business opportunities and to gauge his state of mind. As a part of these meetings, the RM may discover potential opportunities for new sales across various products. The RM may also close existing opportunities, i.e. he/she will either bring in new investment or update the opportunity as lost. A provision is available in the call report to capture the opportunity discovered by the RM from client meetings and to update the status of the prior opportunities discovered

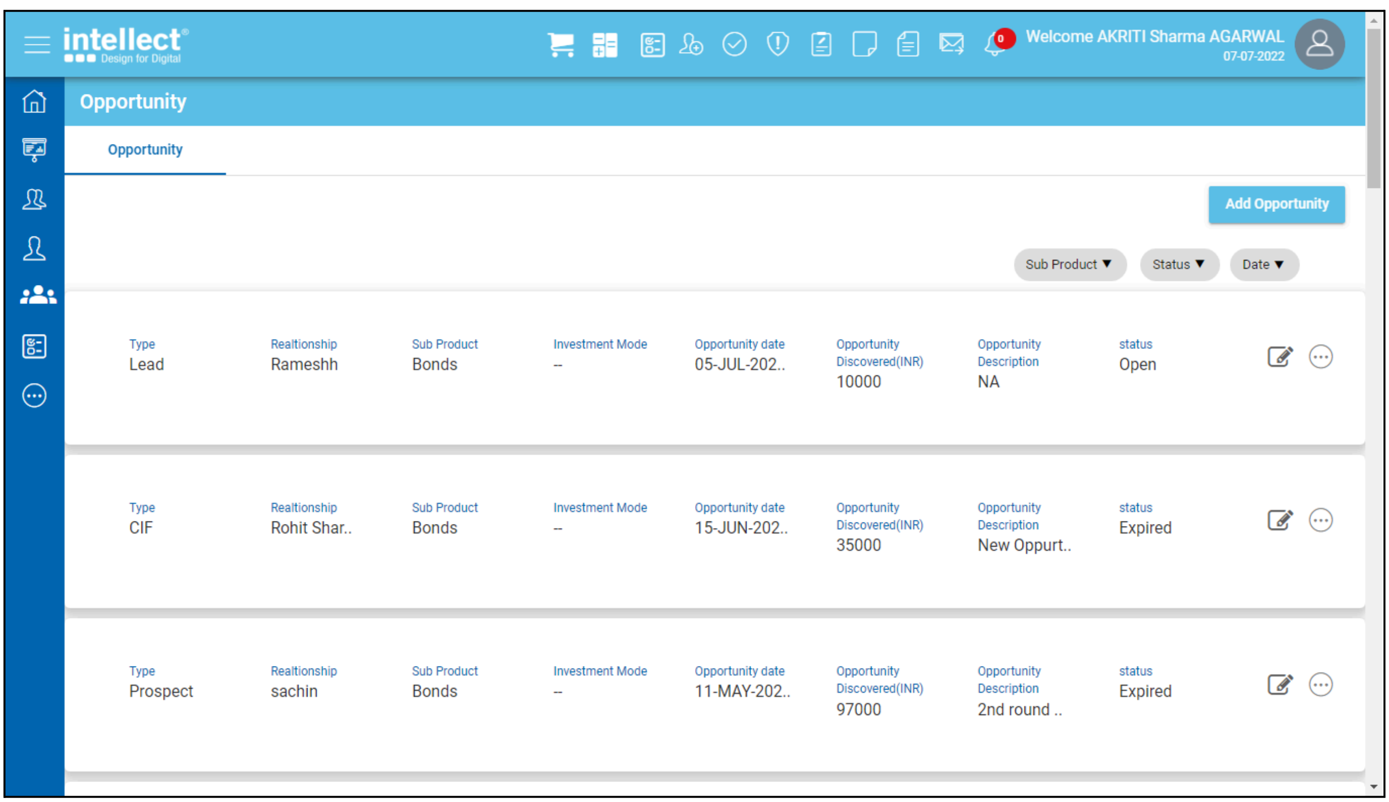
1.4.1 Add an Opportunity

1. The user will click on the Opportunity Tab from the calendar tab



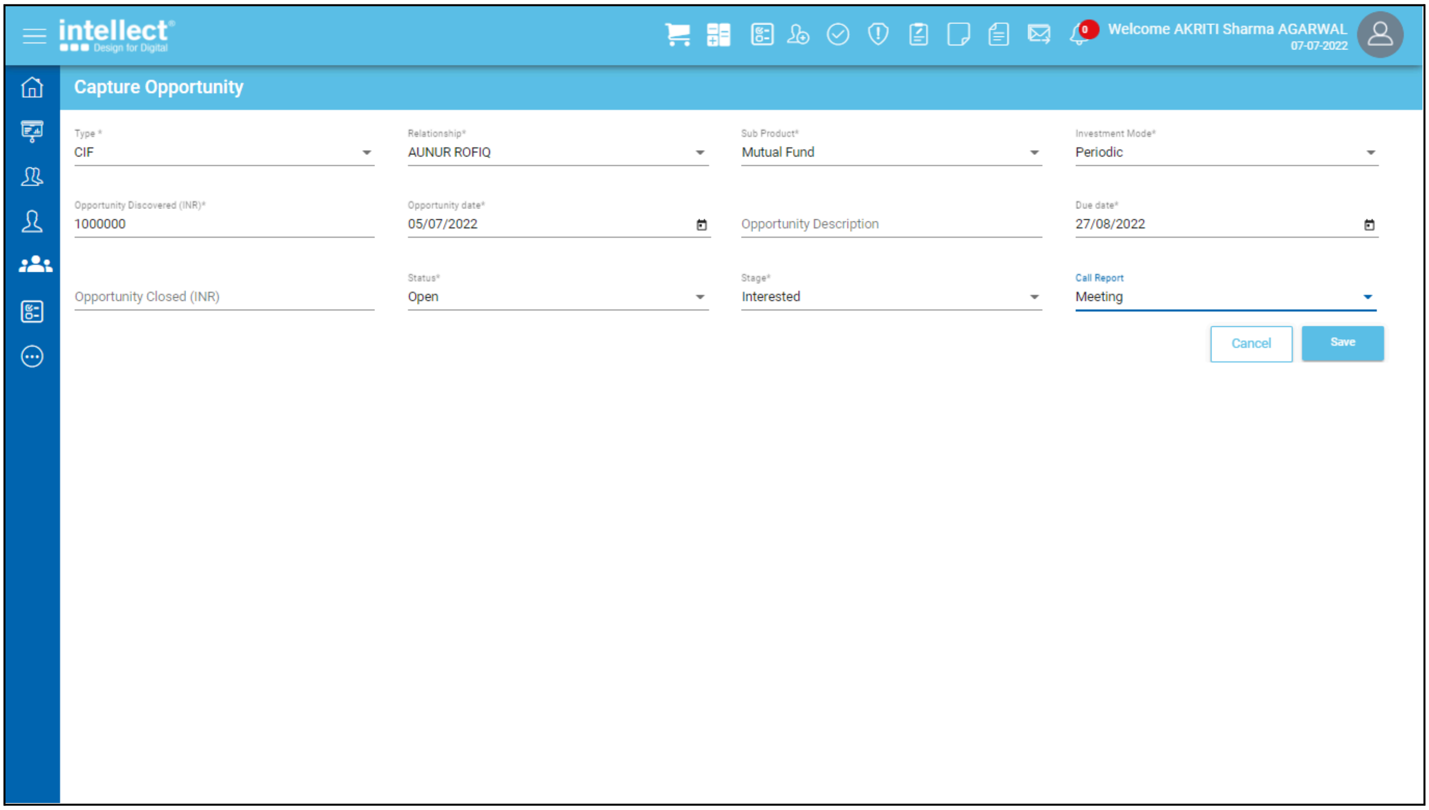
Screen: Opportunity Capture navigation from Calendar screen

2. User will click on “Add Opportunity” Tab



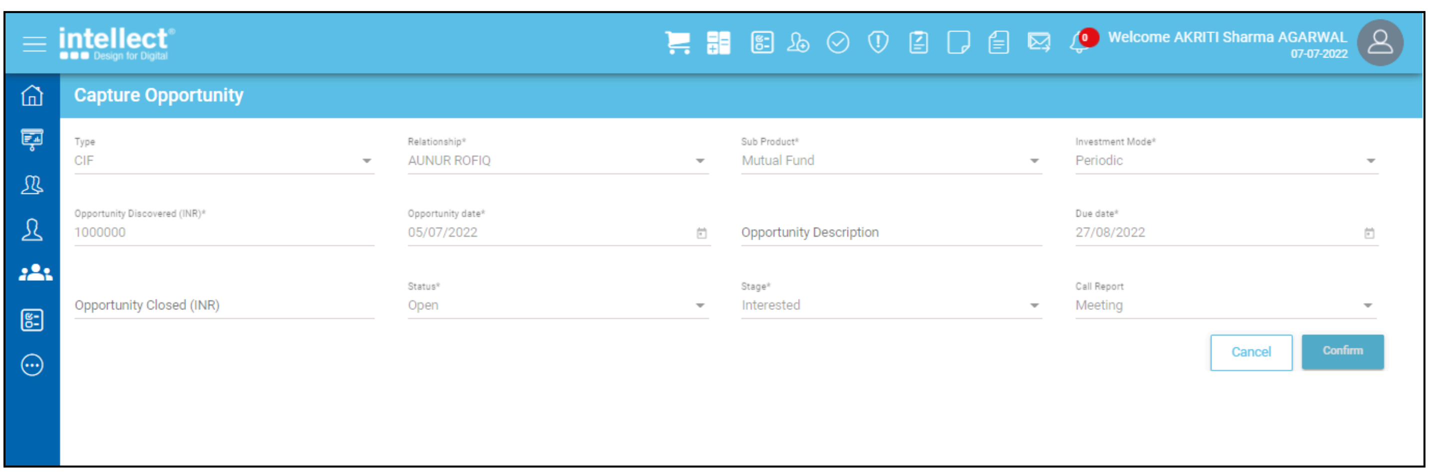
Screen: Opportunity Capture

3. User will enter/select necessary details. Mandatory fields need to be selected



Screen: Add an Opportunity

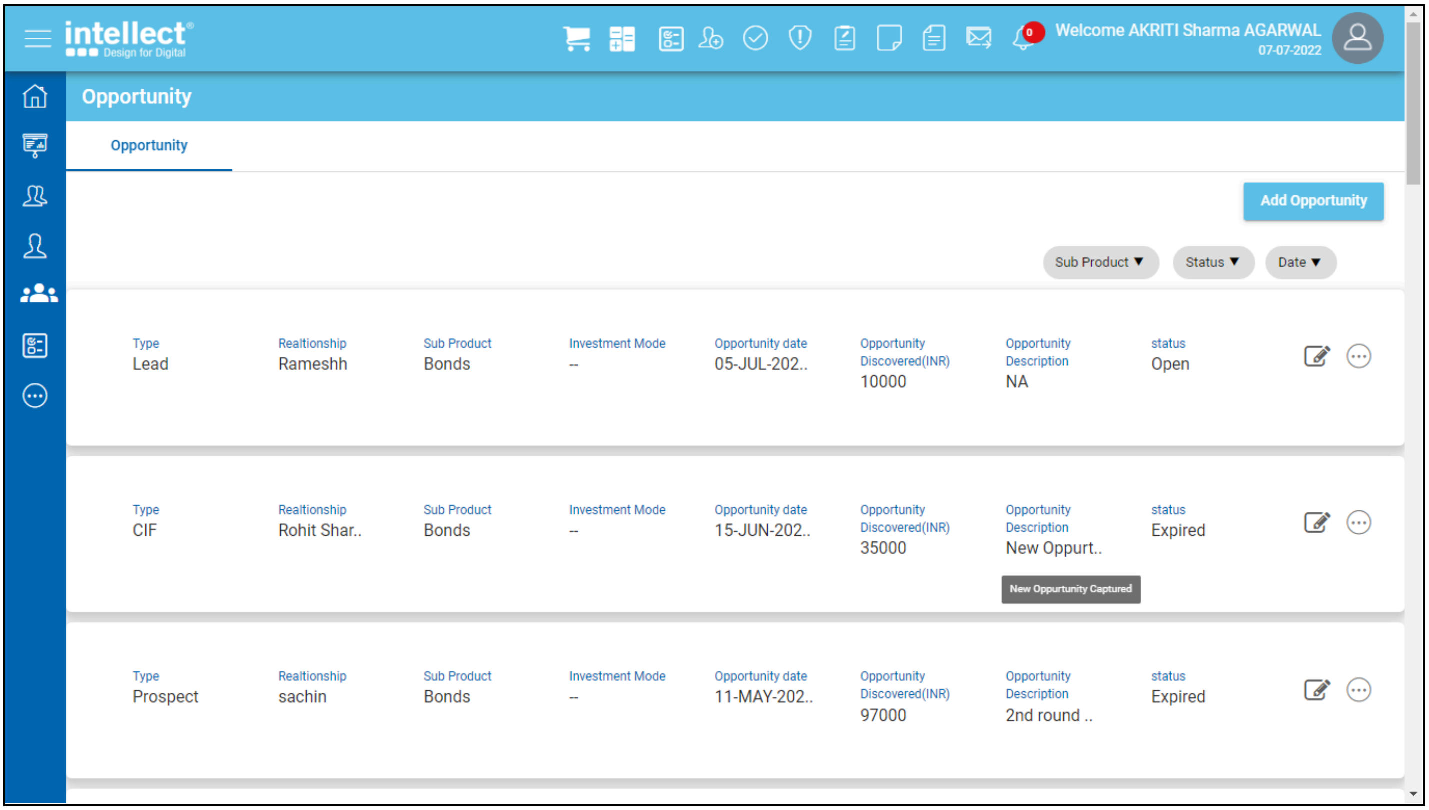
4. Click on Confirm and Save, Opportunity will be successfully saved



Screen: Save and Confirm an Opportunity

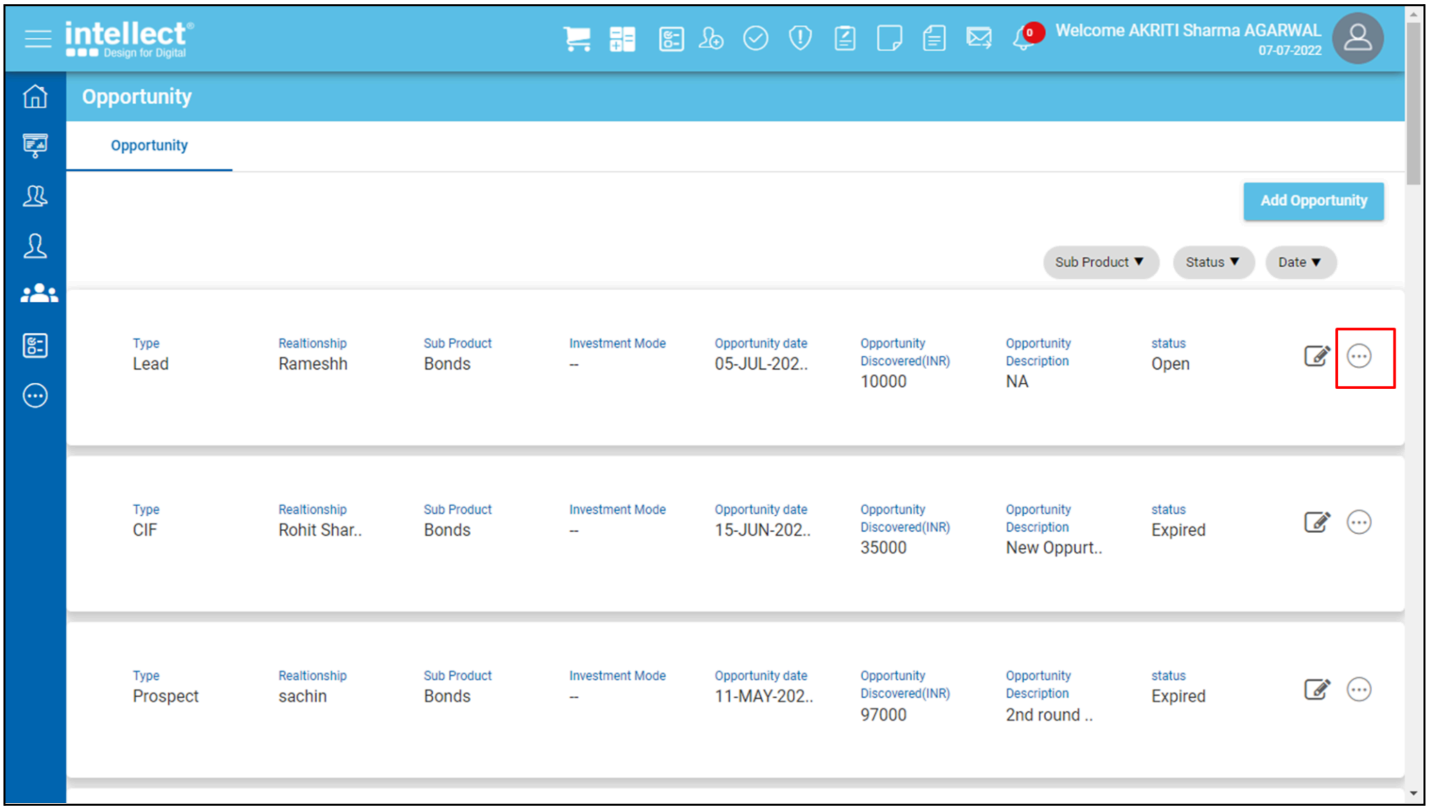
1.4.2 View an Opportunity

1. On navigating to the Opportunity screen, user will be able to see all the captured opportunities



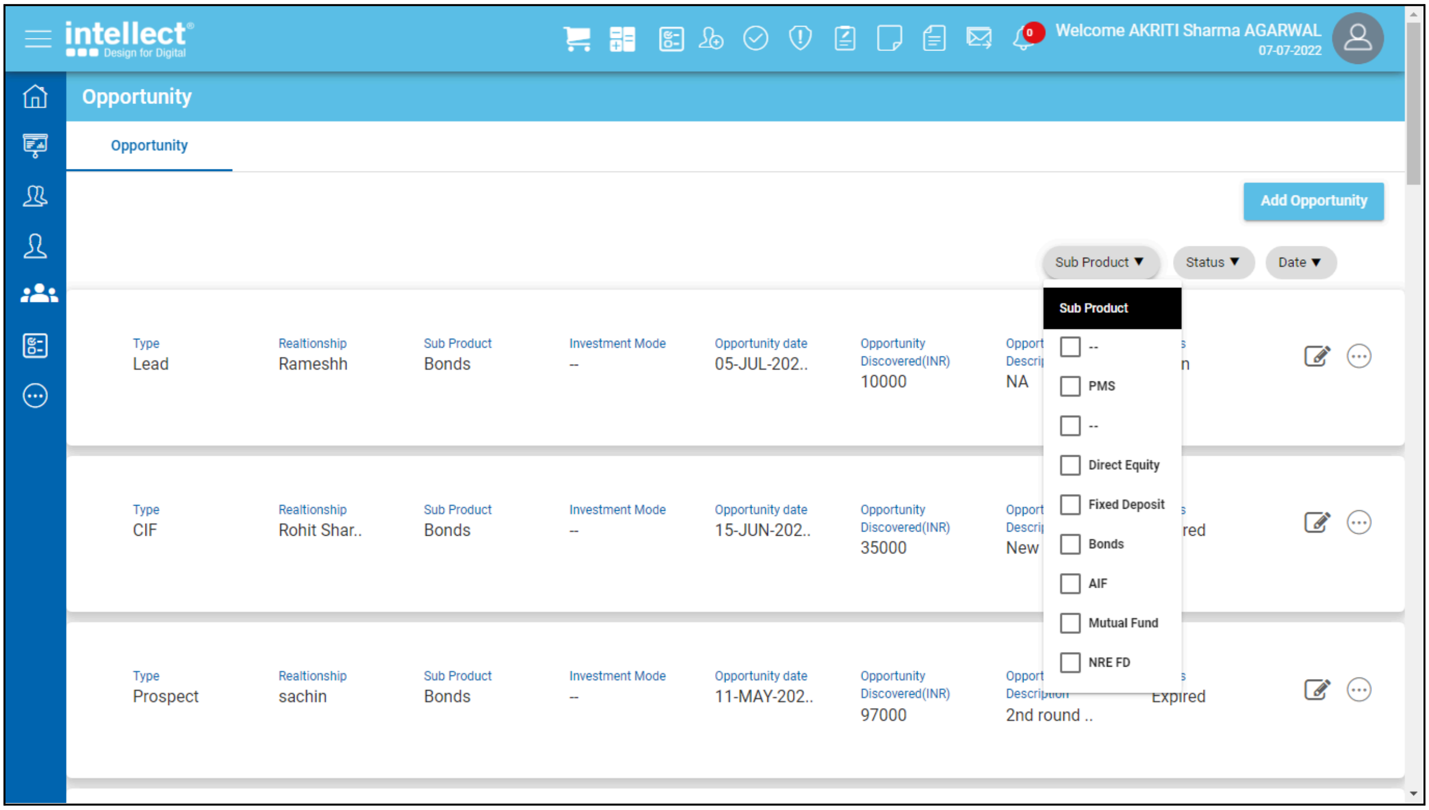
Screen: List of Opportunities Captured

2. To view the existing opportunity, User will click on button and the expanded view of the opportunity captured will be displayed



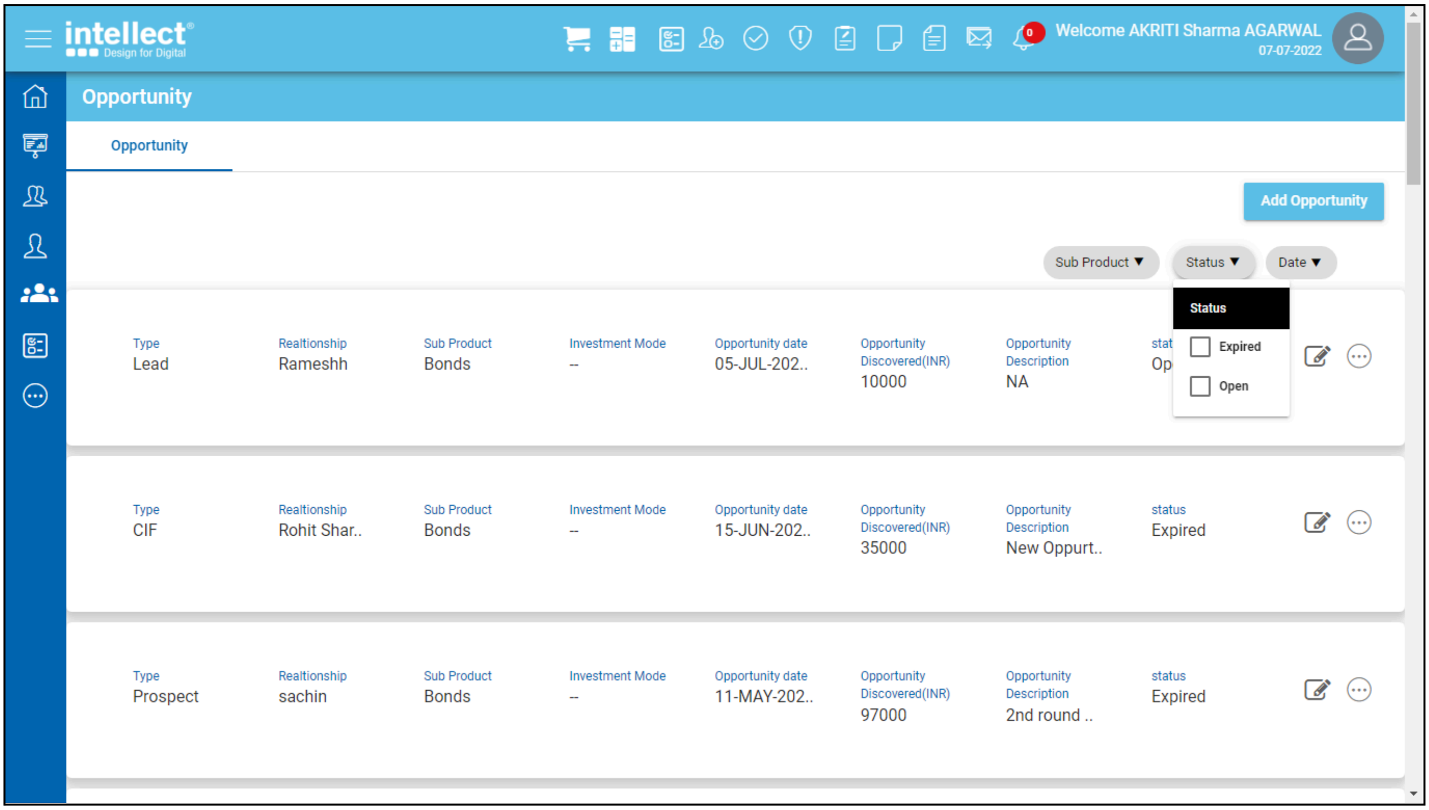
Screen: Expanded view by clicking three dots

3. Users can also filter the opportunity on the basis of “Sub Product“. All the Sub products configured will be displayed in the filter (Refer Field level details)



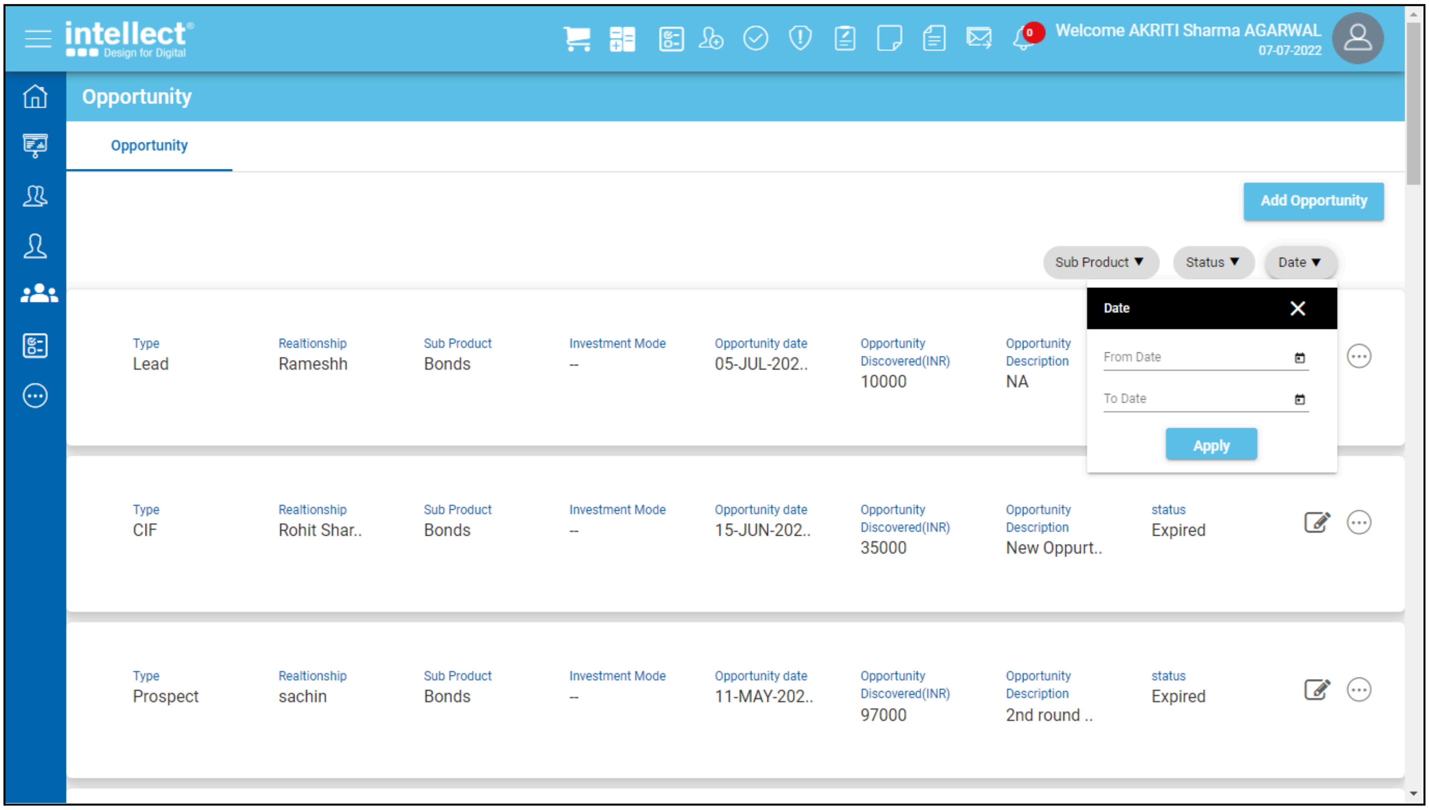
Screen: Sub Product Filter

4. User can also filter the opportunity on the basis of opportunity status. All the statuses which are maintained will be displayed in the application (Refer Field level details)



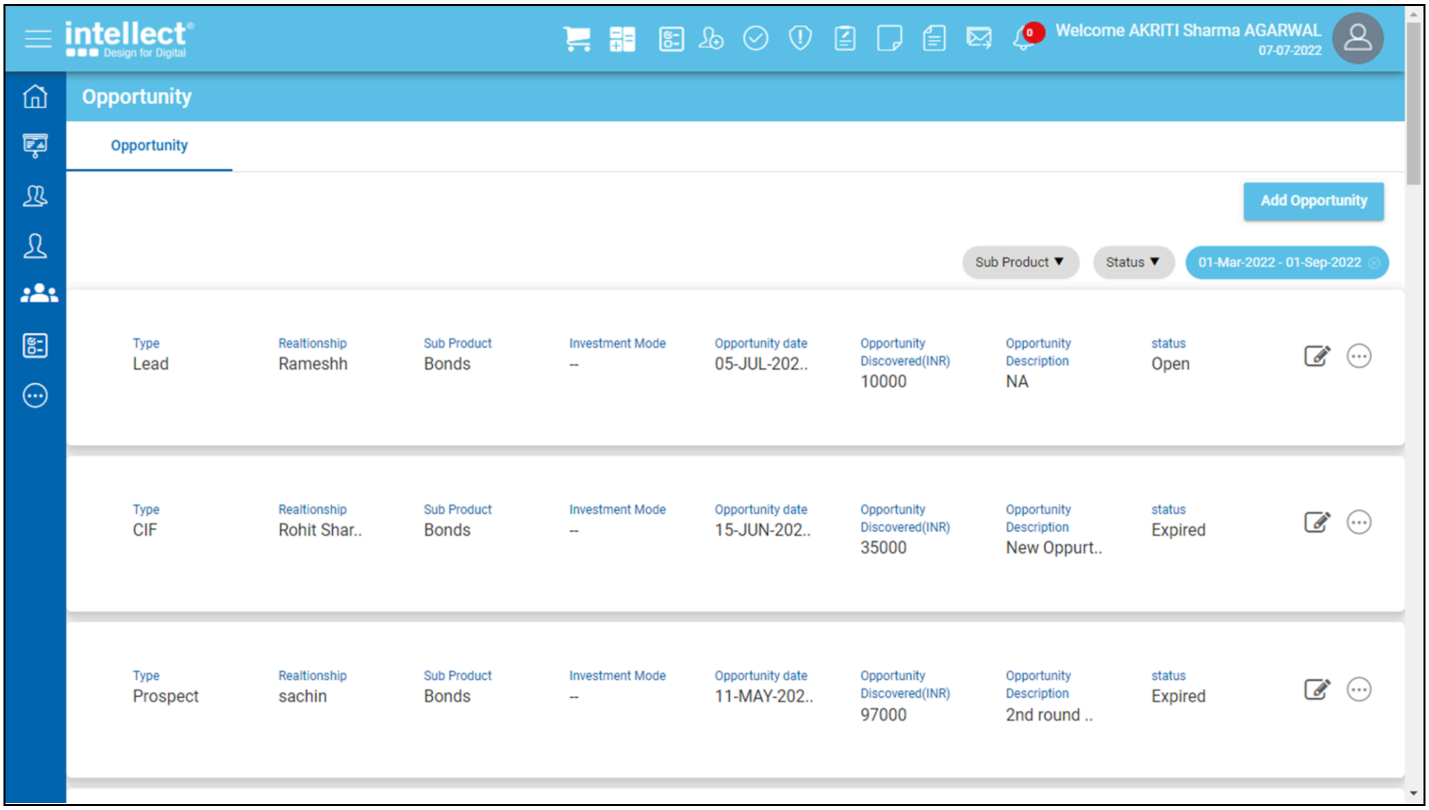
Screen: Opportunity Status Filter

5. There is also a provision to filter the opportunity on the basis of period. User will select from and to date range to select the time period within which the Opportunity was captured



Screen: From and To Date filter

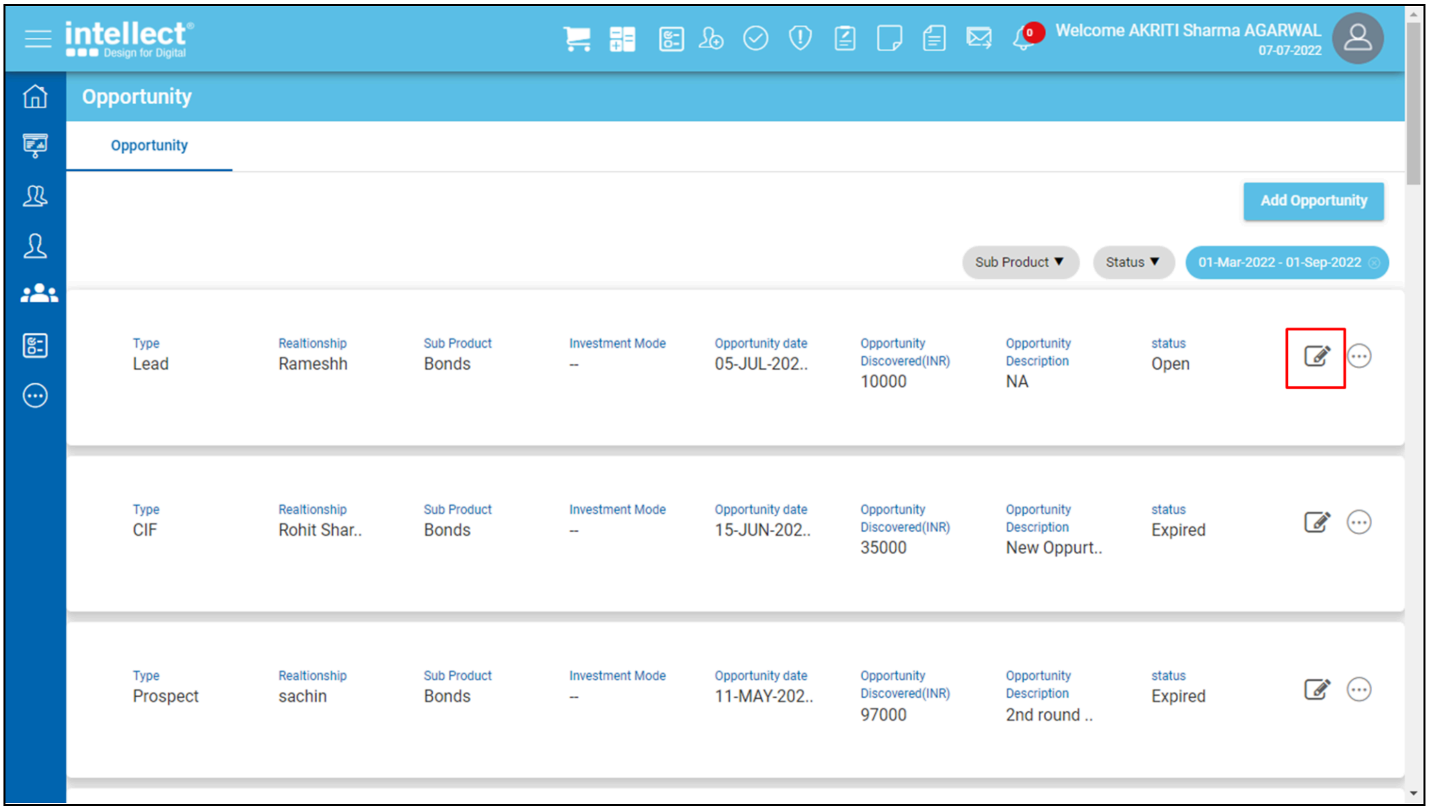
6. Opportunities which were captured within the time period selected will be displayed



Screen: Opportunity displayed as per date selected

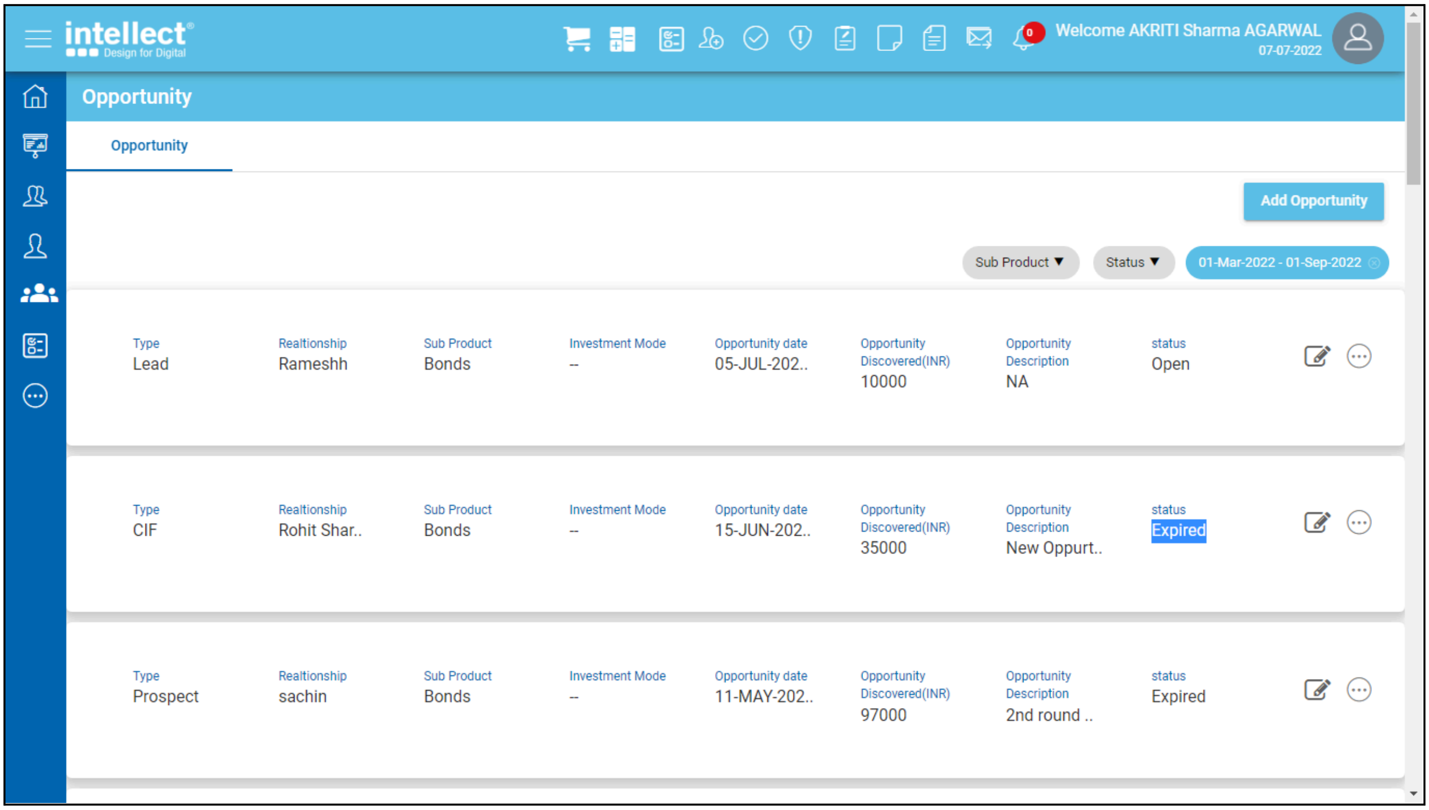
1.4.3 Modify an Opportunity

1. User will click on the  button to modify the already captured opportunity which is in open status. If the Opportunity status is either “Closed” or “Aborted” or “Expired”, user will not be allowed to update the opportunity details



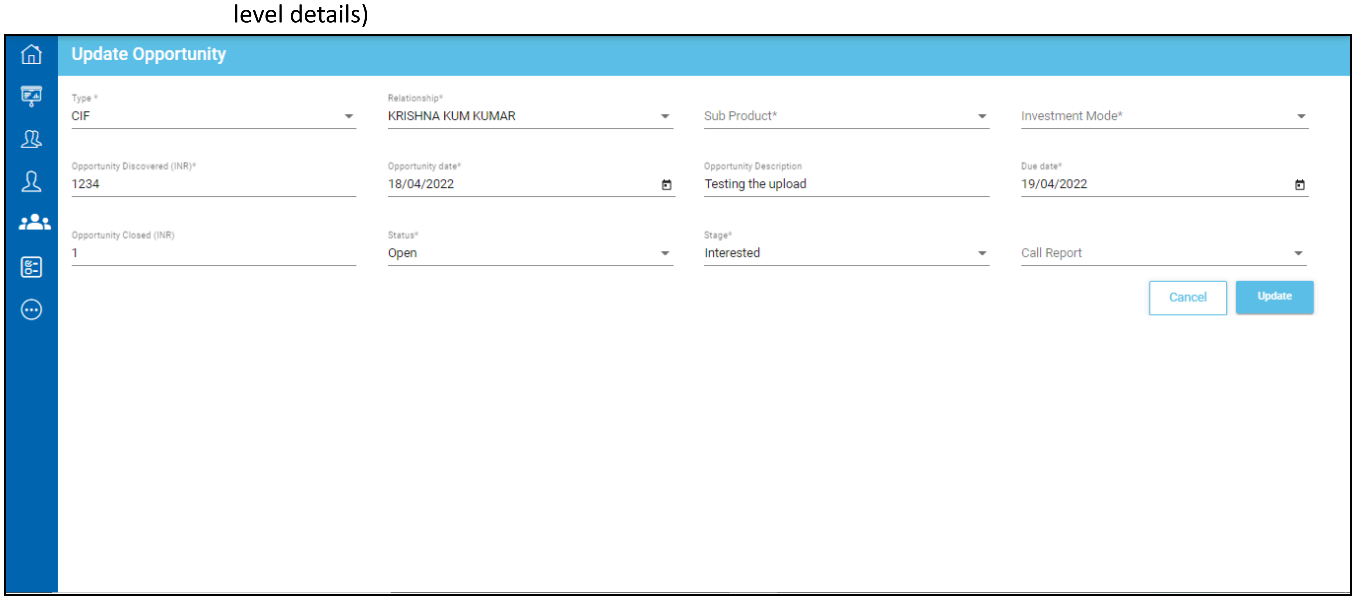
Screen: Modify an Opportunity

2. If the current business date has gone past the due date of the opportunity, the status of the opportunity will be updated as "Expired" in the system



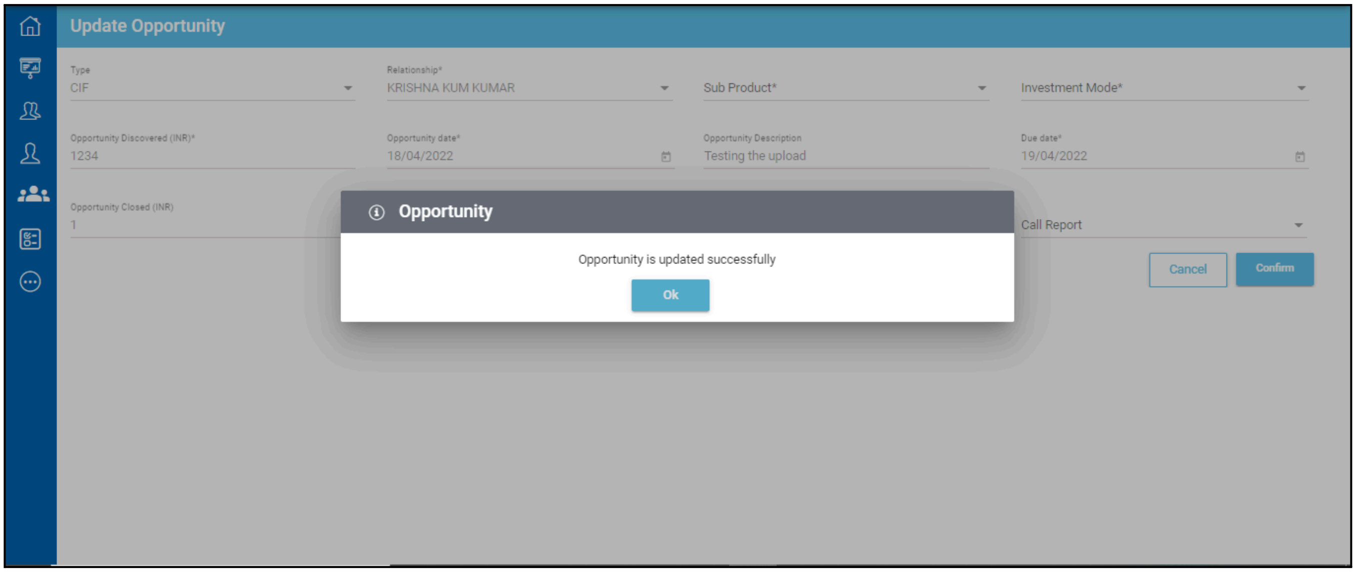
Screen: Expired Opportunity Status

3. The editable fields will be Sub Product, Investment Mode, Opportunity Discovered (INR), Opportunity Date, Opportunity Description, Due Date, Opportunity Closed (INR), Status, Stage, Call report (Refer field level details)



Screen: Modify an opportunity

4. Once the details are modified, user will update and confirm the record

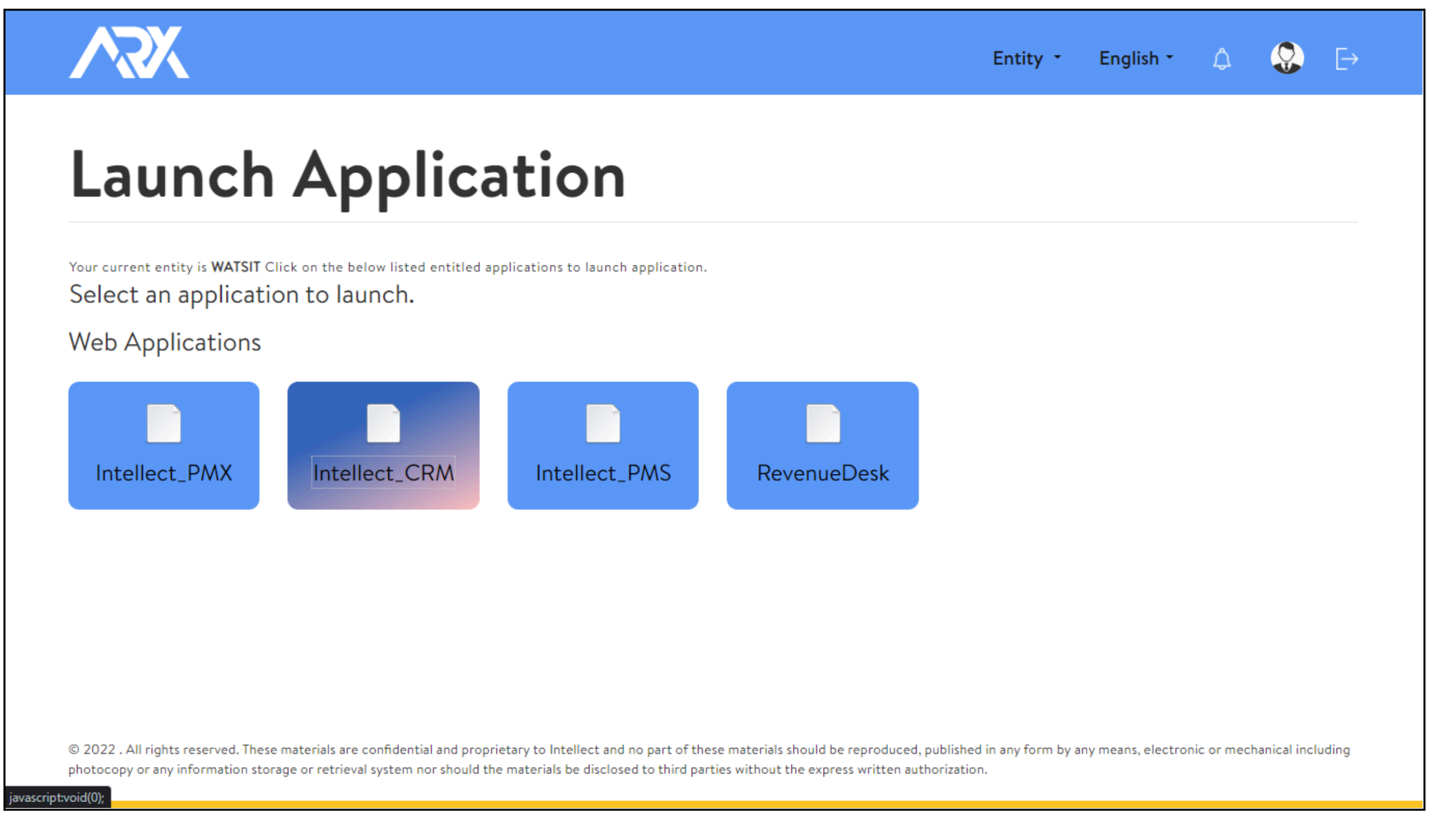


Screen: Opportunity Modified Successfully

4.5. Opportunity File Upload

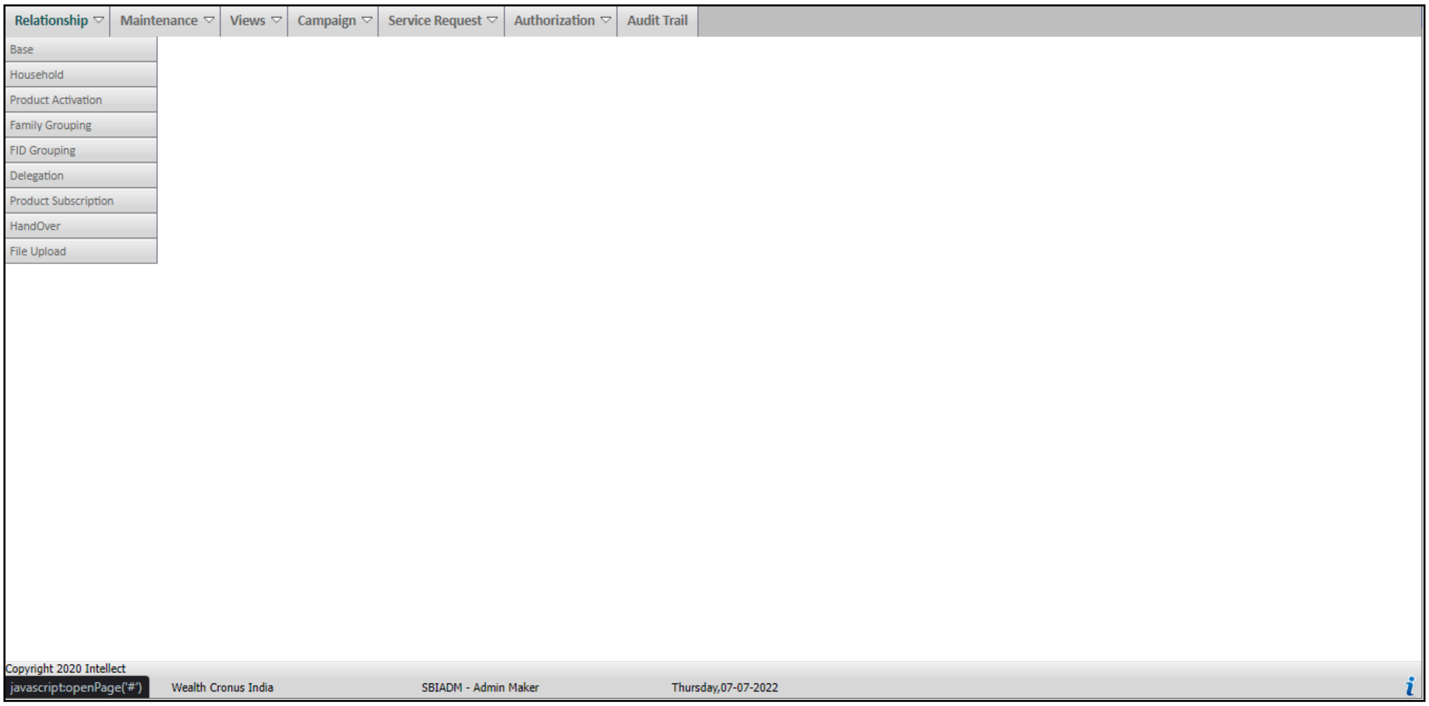
The system has the capability to upload bulk opportunities linked to the RM. Based on this bulk upload RM can take the advantage of the opportunity present in the Opportunity screen

1. User will log in to the application and navigate to "Intellect_CRM"



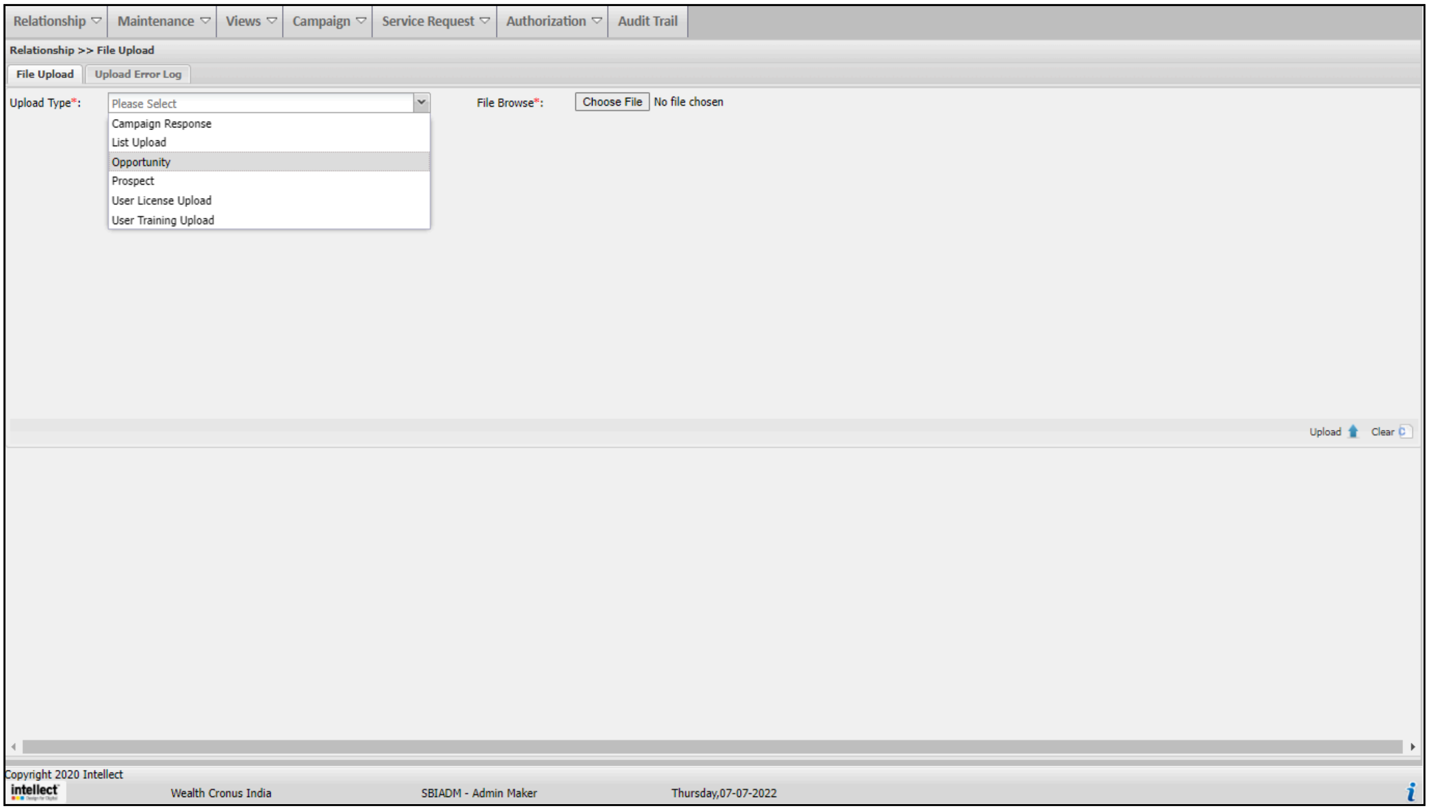
Screen: Login screen

2. User will hover over "Relationship" and click on "File Upload"



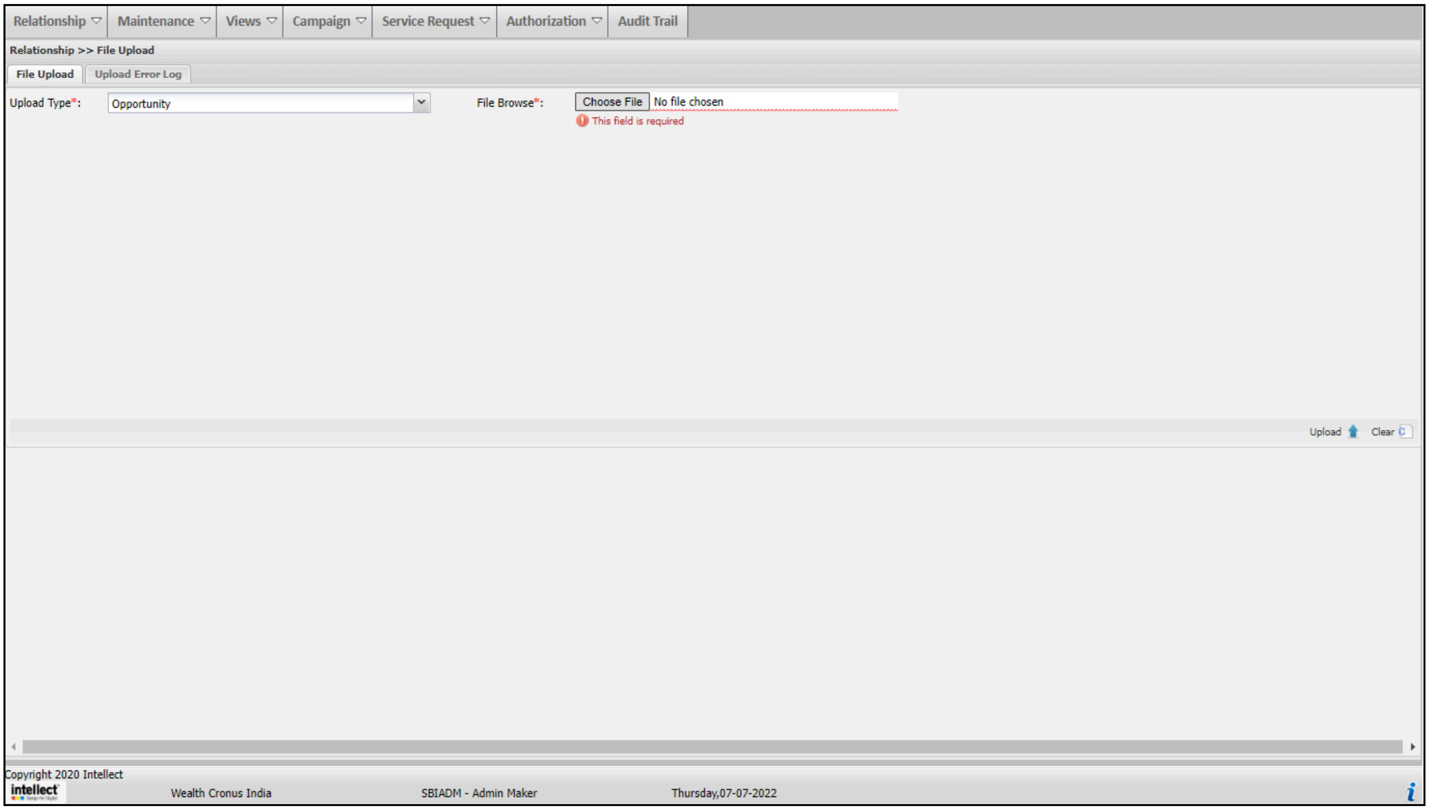
Screen: Relationship >> File Upload

3. From the upload type dropdown, user will select "Opportunity"



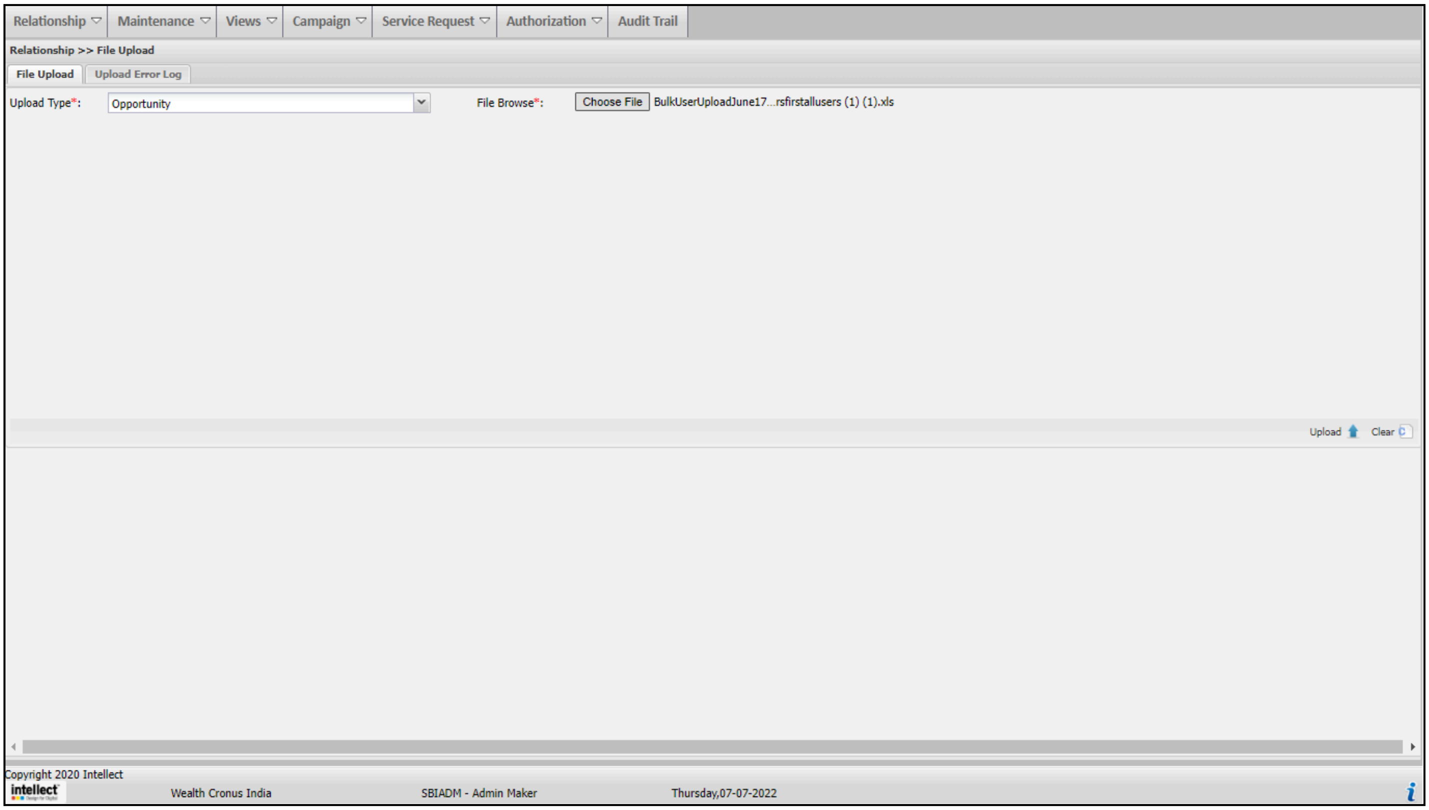
Screen: Select Opportunity file upload

4. User will click on “Choose File” and select the desired file from the windows explorer window



Screen: Select File to be uploaded

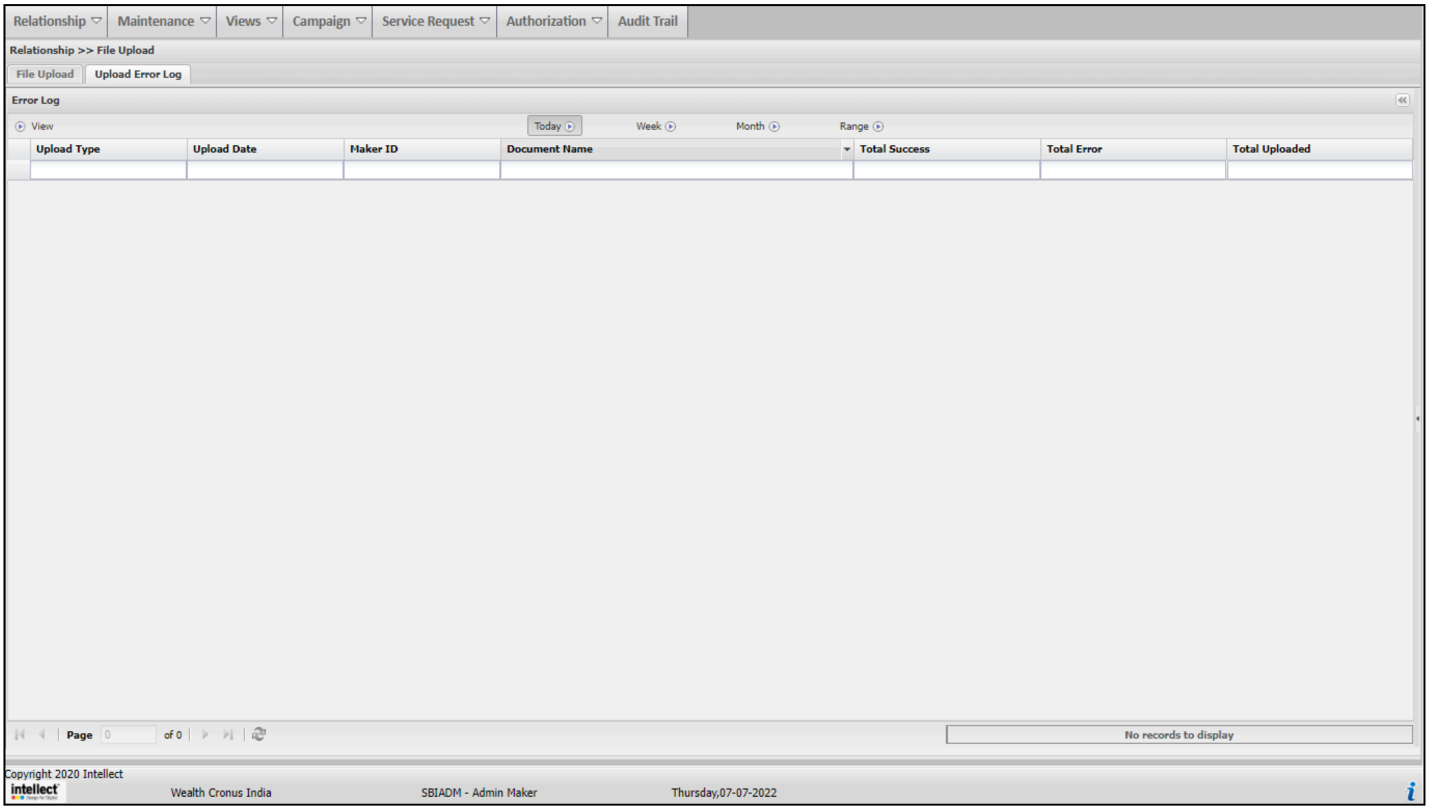
5. After selecting the desired file, the user will click on “Upload”



Screen: Select File to be uploaded

6. After the file has been uploaded, the system will give a confirmation message “Upload done successfully”

7. User can now navigate to “Upload Error Log” to view the results of the upload



Screen: Upload Error log screen

8. The allowed formats for upload are xls, xlsx.

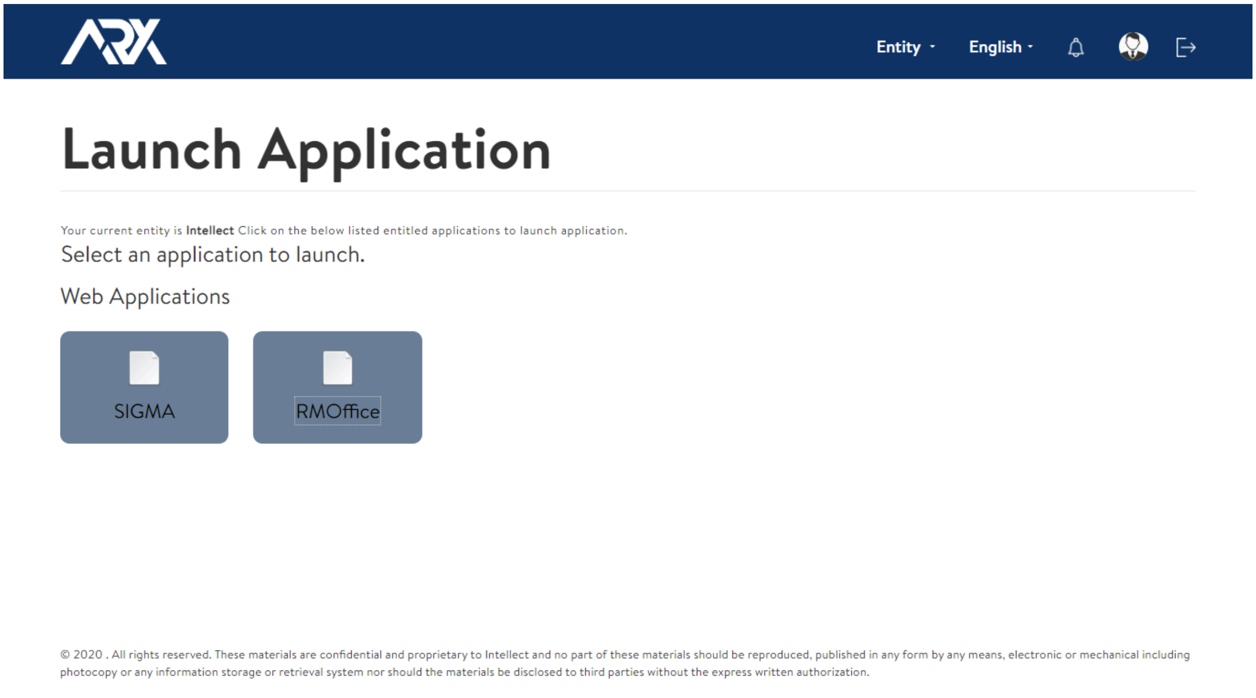
9. The format of the upload template is as below

Opportunity Upload.xlsx

4.6. Call Report Approval

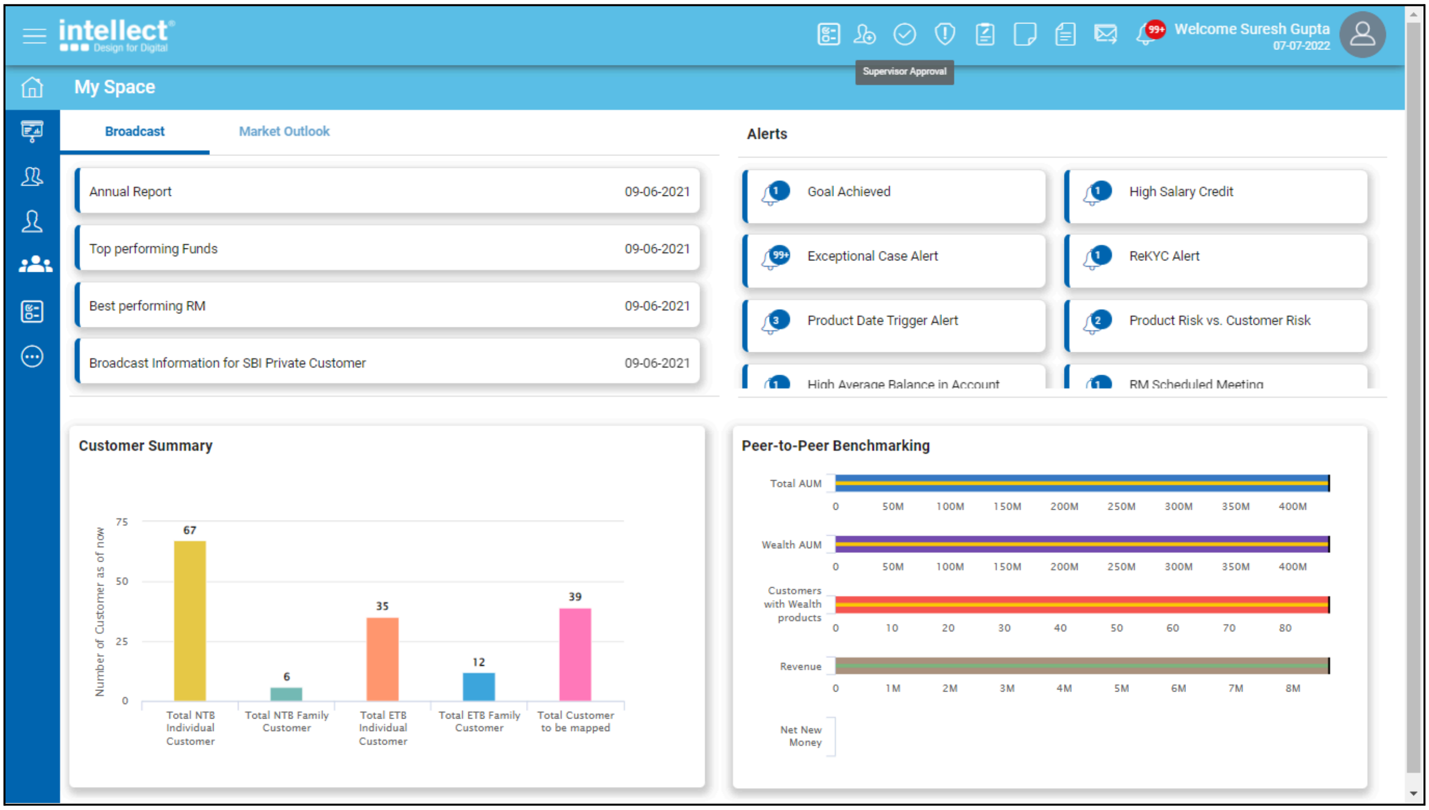
To keep a track of a meeting and subsequent call report for that meeting an RM needs to file a call report within 5 days of the meeting date. If a call report is filed after 5 days approval will be required from the supervisor to change the call report status as “Completed”. Till the time the call report is approved the status of the call report will be “Pending for Approval”

1. For approval, the supervisor needs to log in to the RM office application



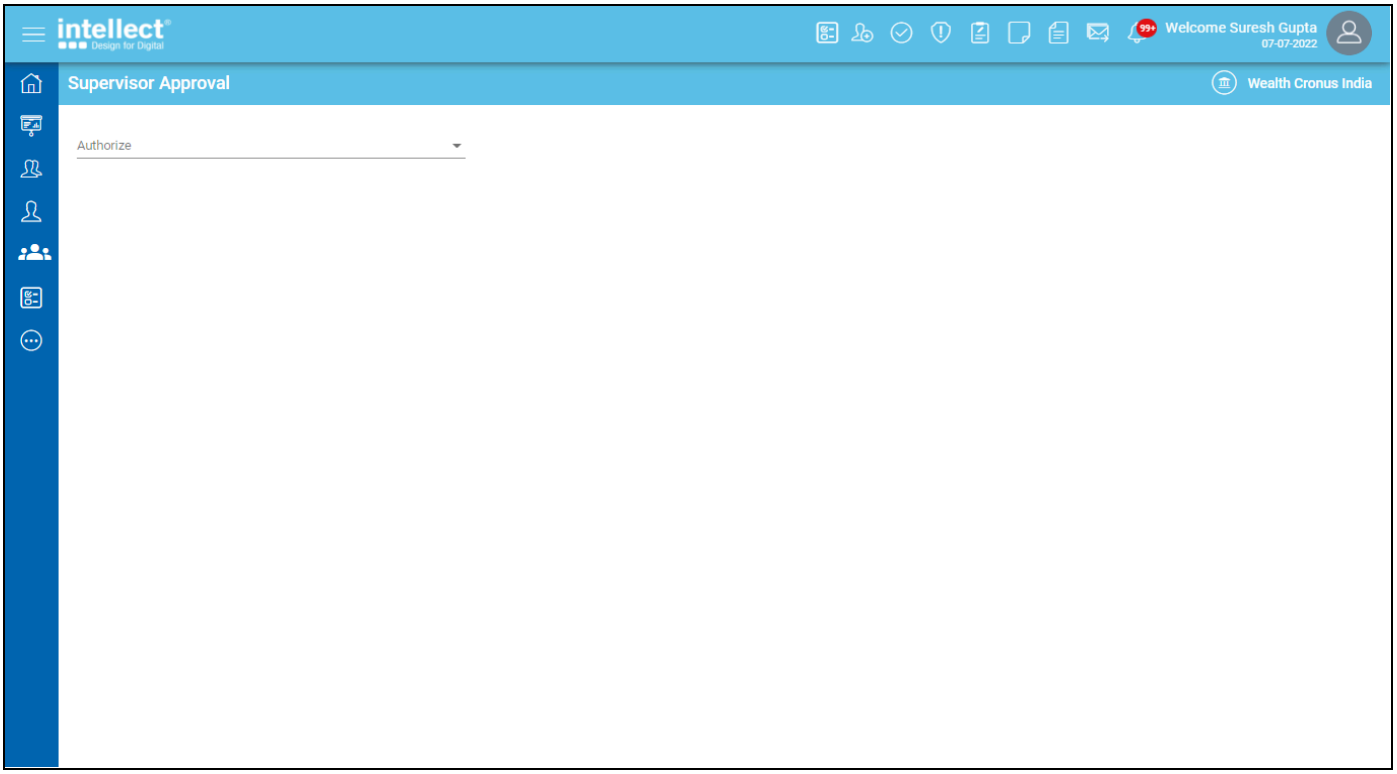
Screen: Supervisor Login

2. Supervisor can then click on to access the supervisor workspace



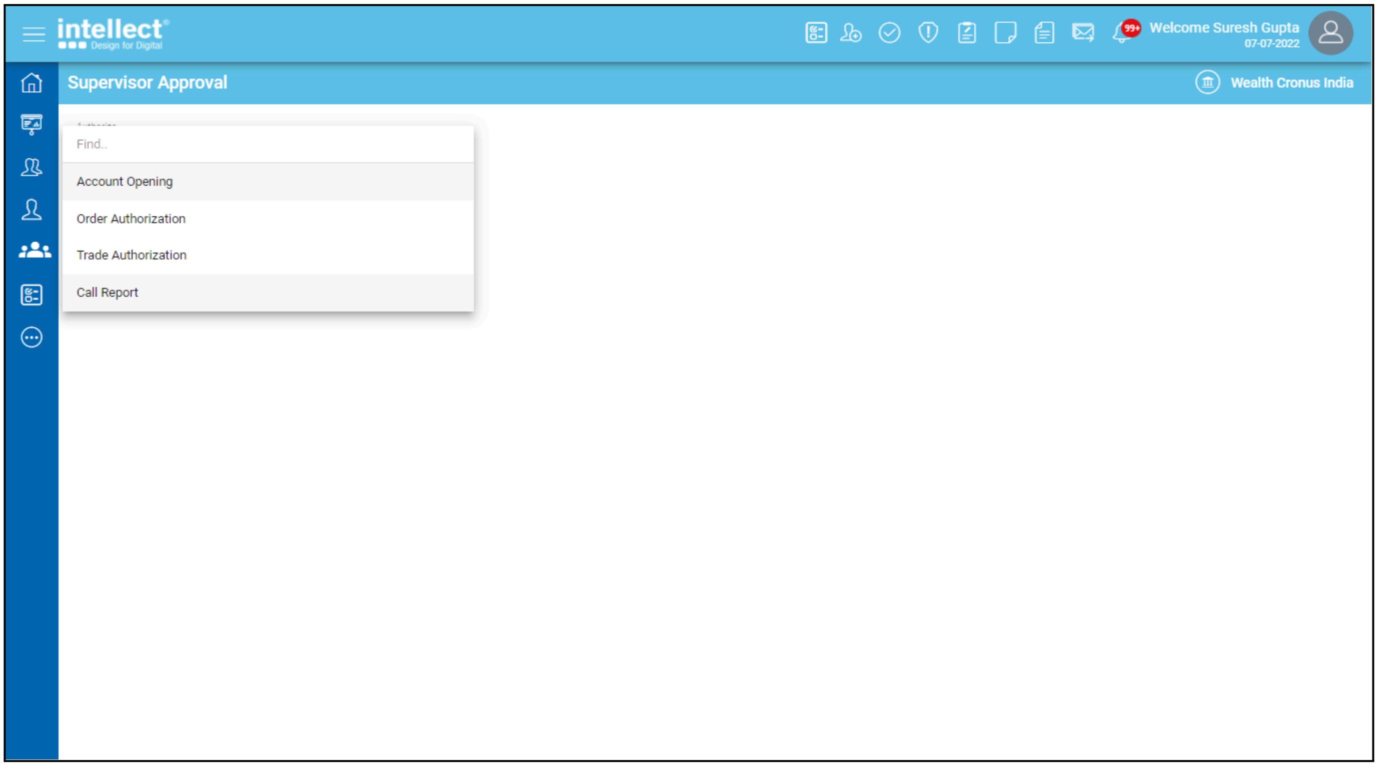
Screen: Supervisor Approval

3. The supervisor can then click on the "Authorize" menu



Screen: Authorize dropdown

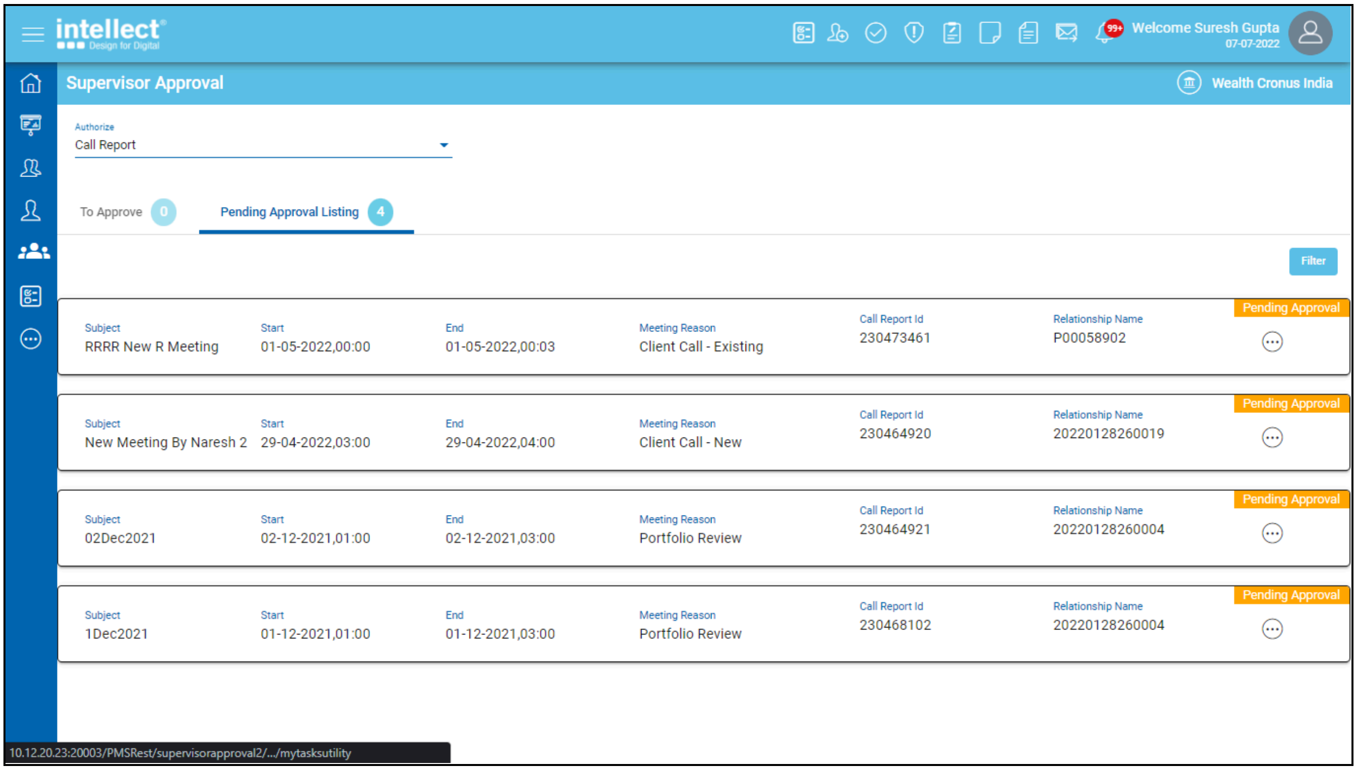
4. The supervisor can then select “Call Report” from the Authorize menu



Screen: Select Call report

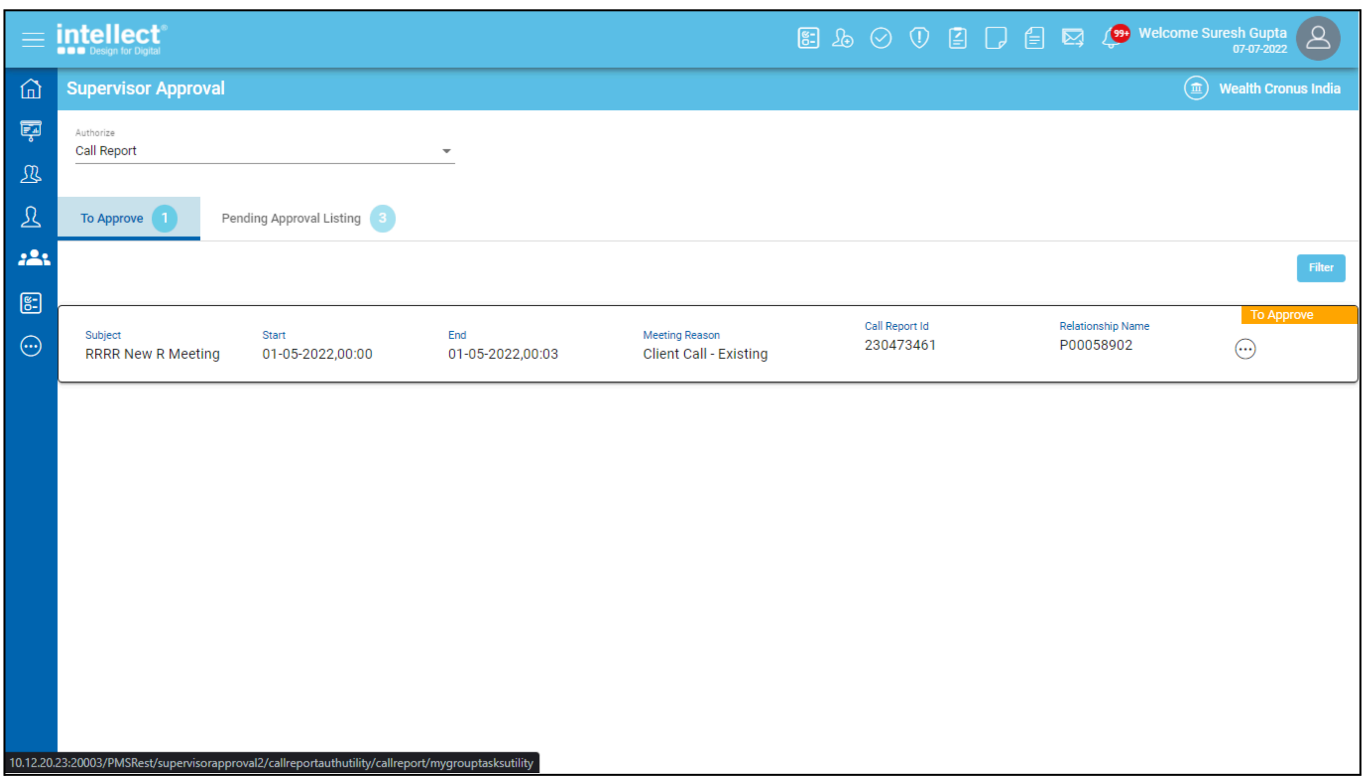
5. The authorization screen will have 2 buckets

6. Pending Approval Listing – This will display all the call reports that are available in the common pool for authorization



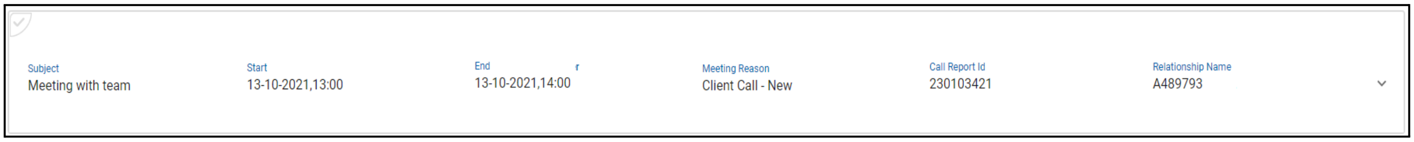
Screen: Pending for Approval

7. To Approve – This will display the call reports that has been claimed by the supervisor for approval



Screen: Approval bucket of Supervisor

8. From the “Pending Approval Listing”, the supervisor can select the desired card and click on “Claim”, the card will now appear in the “To Approve” list



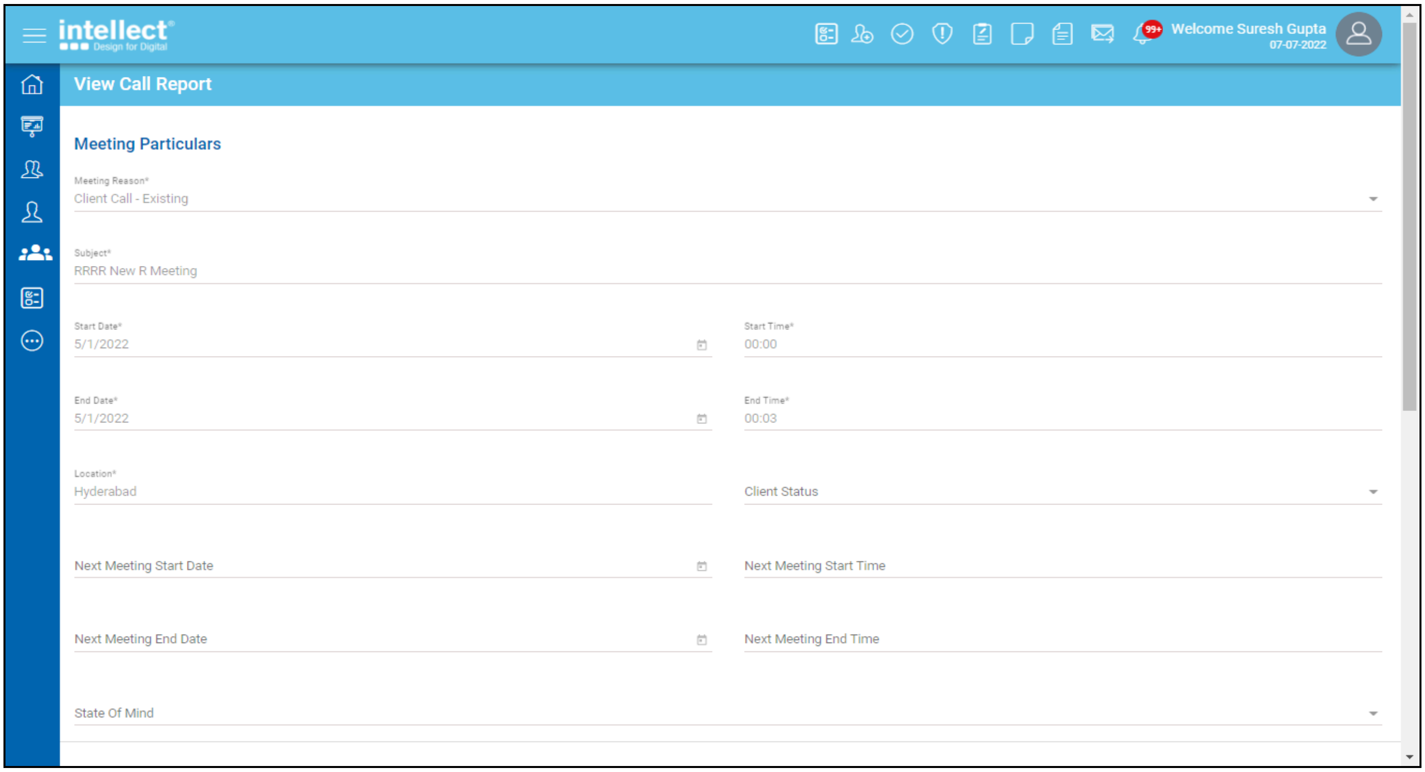
Screen: Call Report approval card collapsed view

Screen: Call Report approval card expanded view

9. From the “To Approve” list, supervisor can select the desired card and click on “View”

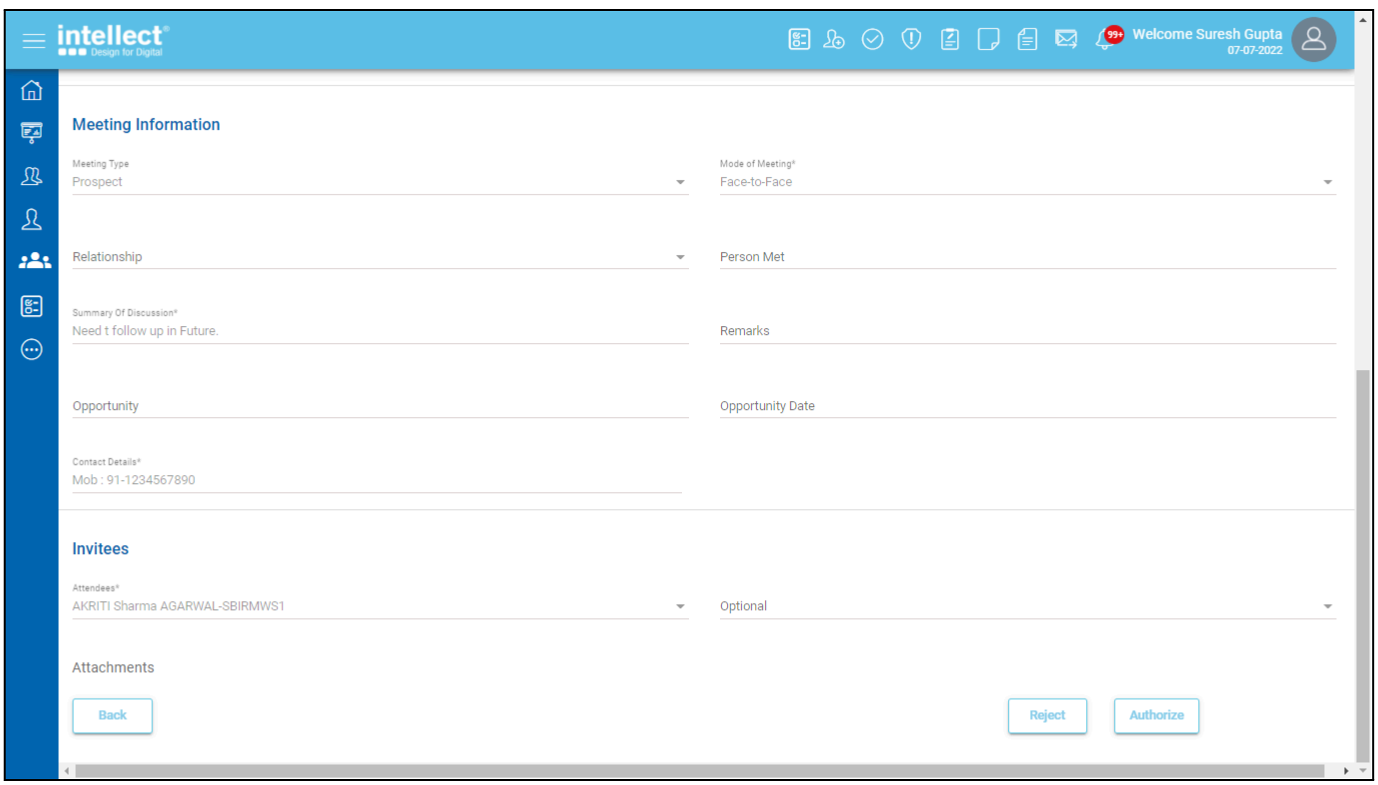
Screen: Call Report approval card from “To Approve” list

10. The call report will be displayed in read only mode



Screen: Call report details

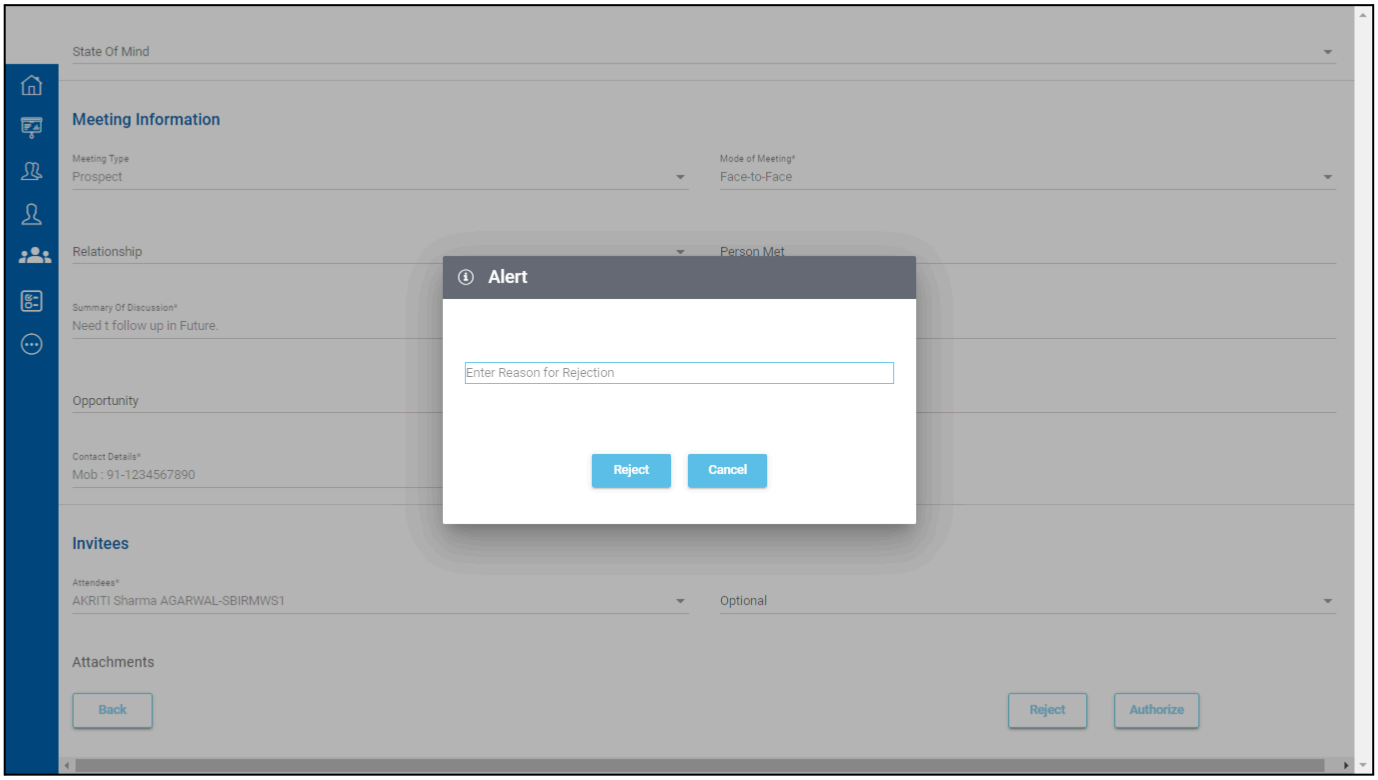
11. The supervisor can review the details and click on "Authorize" to approve it



Screen: Authorize tab for call report

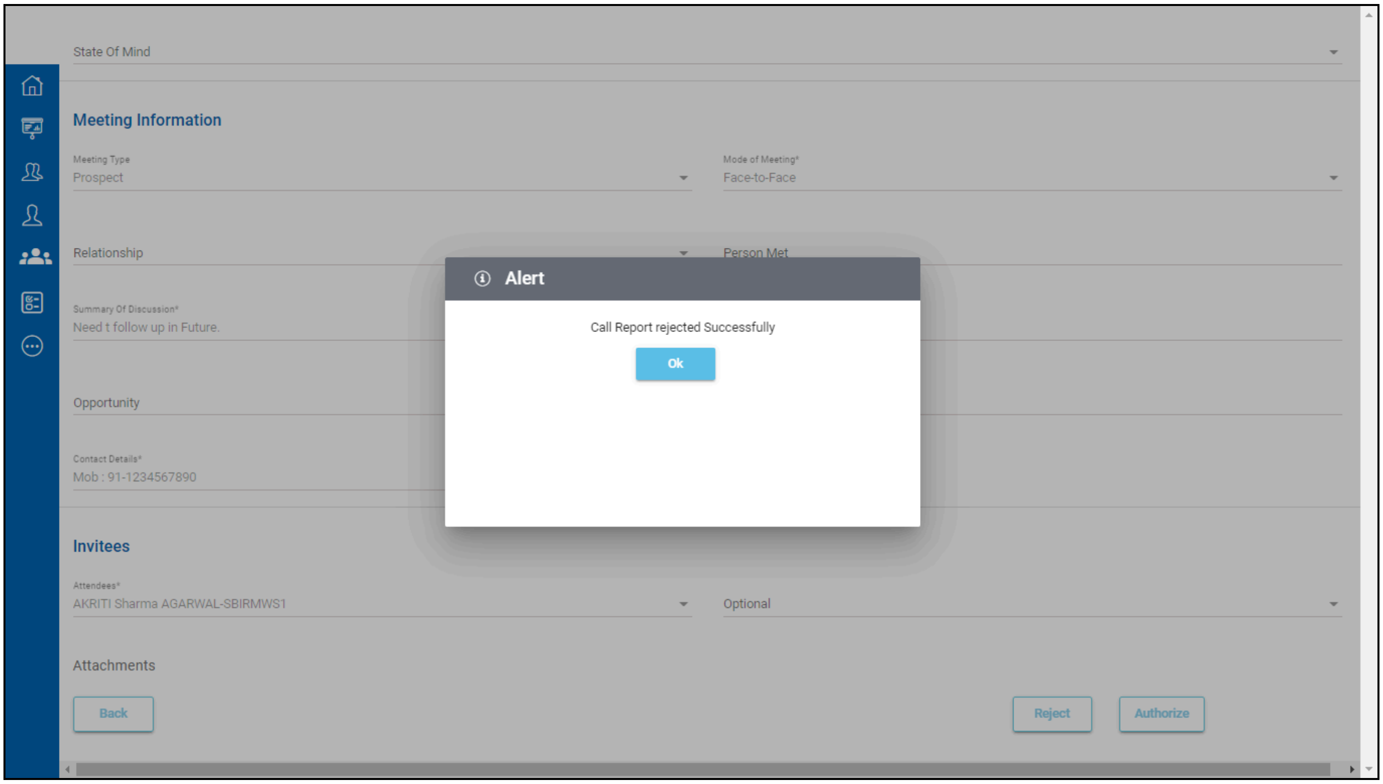
12. In case of any issues, the supervisor can click on "Reject"

13. The system will prompt the supervisor to enter the rejection reason



Screen: Rejection reason

14. The supervisor can enter the rejection reason and click on "Submit"

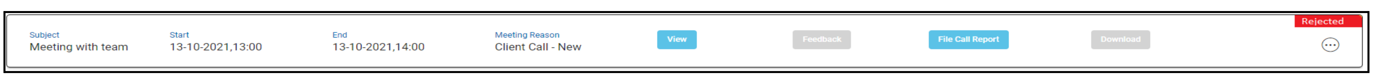


Screen: Call report rejected

15. The rejection reason will be saved in the system and the same will be displayed to the RM

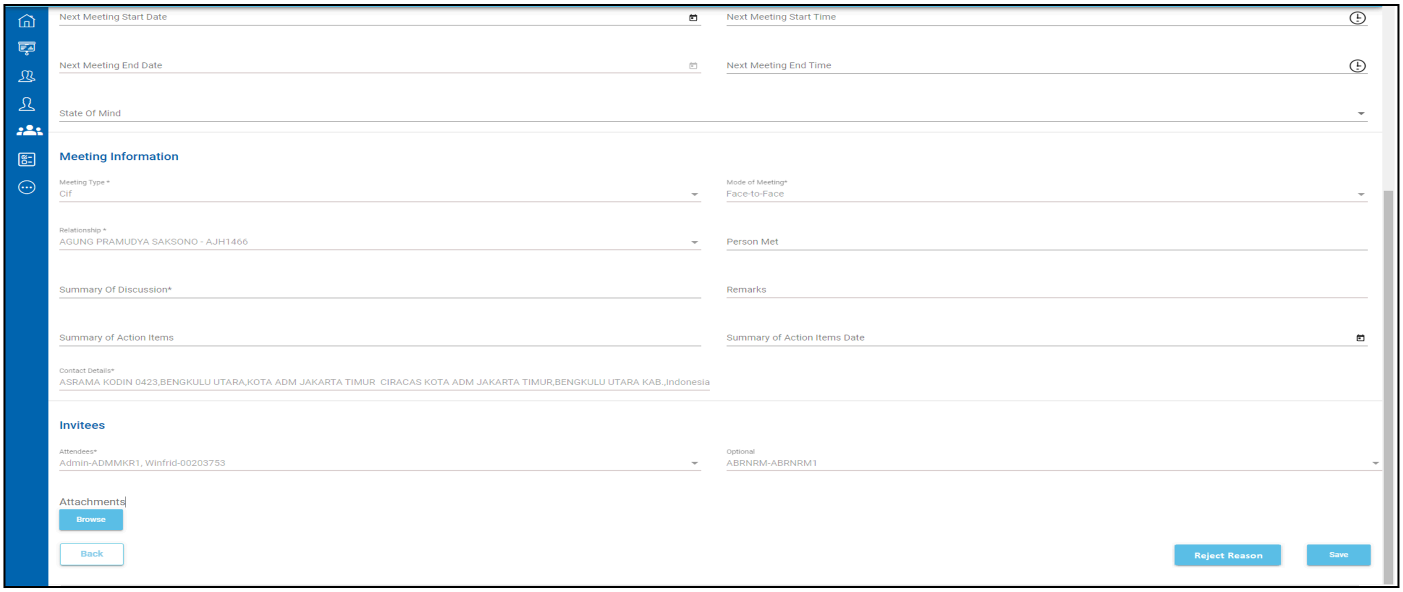
16. RM can check for the rejection reason from the call report

17. RM will search for the desired card and click on "File Call Report"



Screen: Rejected Call Report

18. To view the rejection reason, RM can click on the "Reject Reason" button



Screen: Rejected Call report details

19. The rejection reason will be displayed in a pop up

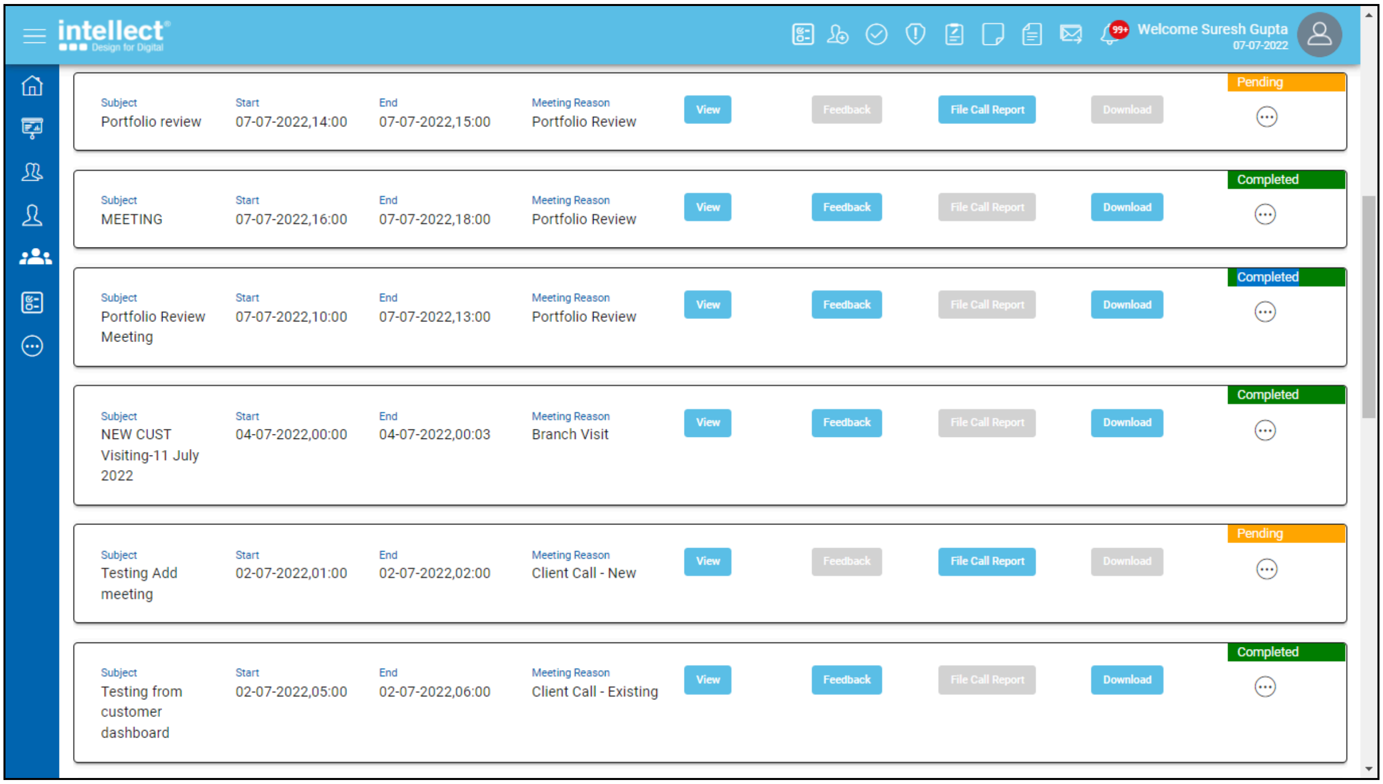
Screen: Rejection Reason

20. RM can accordingly make changes and submit in the application for supervisor approval

21. After the call report is submitted, the status of the call report will be updated as "Pending Approval"

22. The approval process will remain the same as from step 1 to step 12 above

23. A call report is considered as submitted if the status of the call report is "Completed" or "Approved"



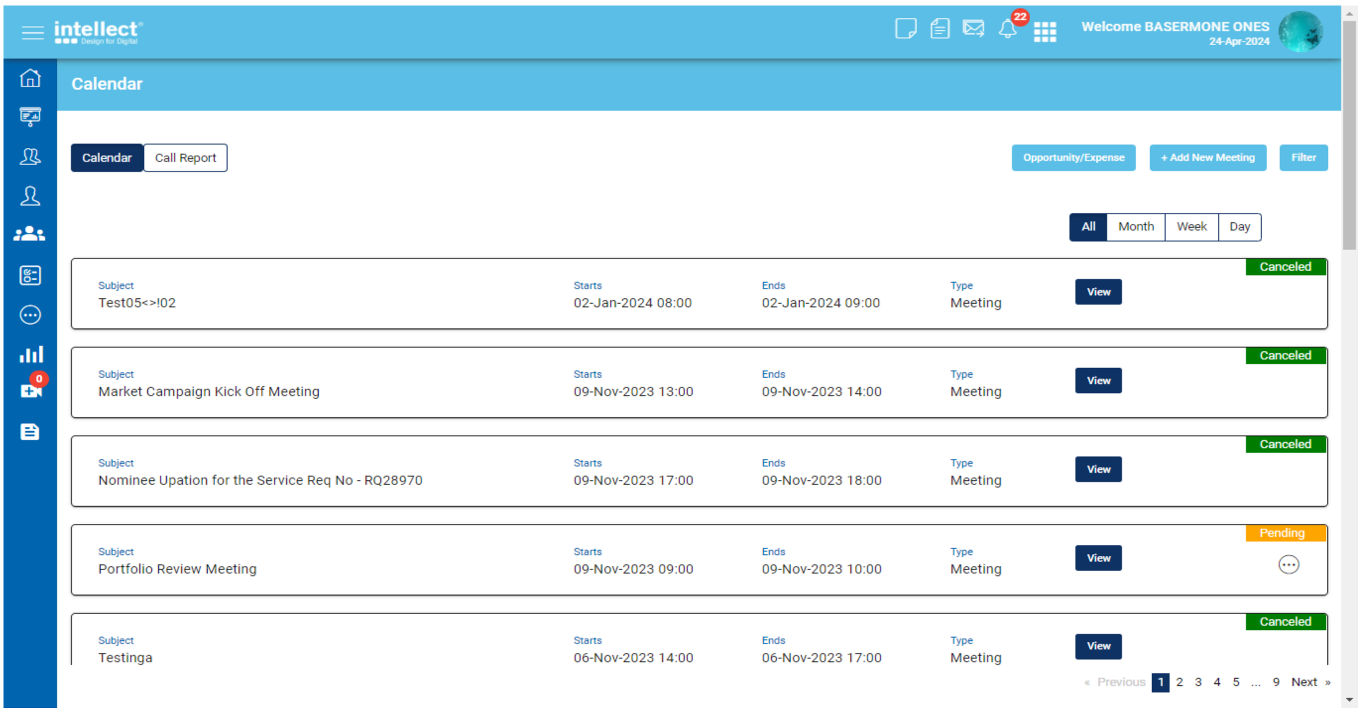
Screen: Submitted Call Report

4.7. Expense Capture

1. User will log into the application and navigate to RM Office.

2. User will then click on  icon to navigate to “Calendar”.

3. User will then clicks on “Opportunity/Expense” and navigate to “Expense” tab.



Screen: Calendar >> Opportunity/Expense

4. In the “expense” tab, all the expenses that are currently captured in the system will be displayed and sorted as per the expense date in descending order.

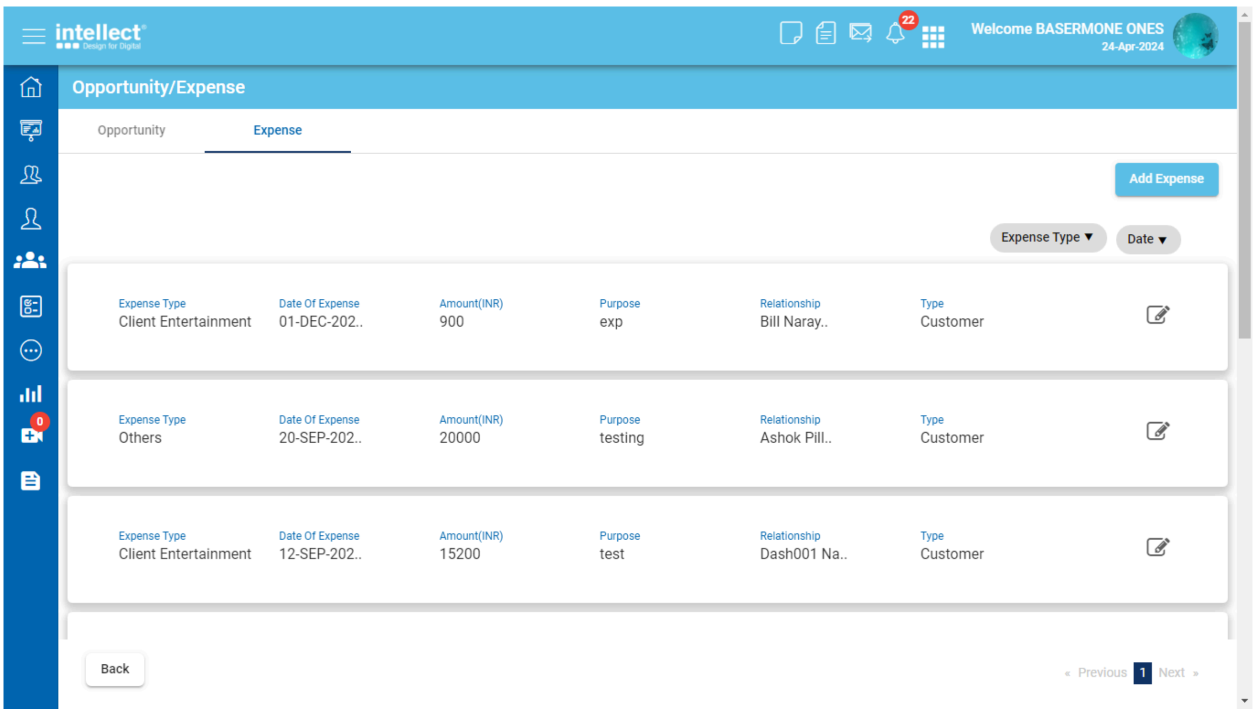
5. A filter on “Expense Type” will be available for the user to filter the expense cards.

6. User will also have the option to filter the expense cards as per the expense date using From Date and To Date filter.

7. To view an existing expense, user can click on , the expense details will be displayed in read only mode.

8. To edit an existing expense, user can click on ; the expense details will be displayed in editable mode.

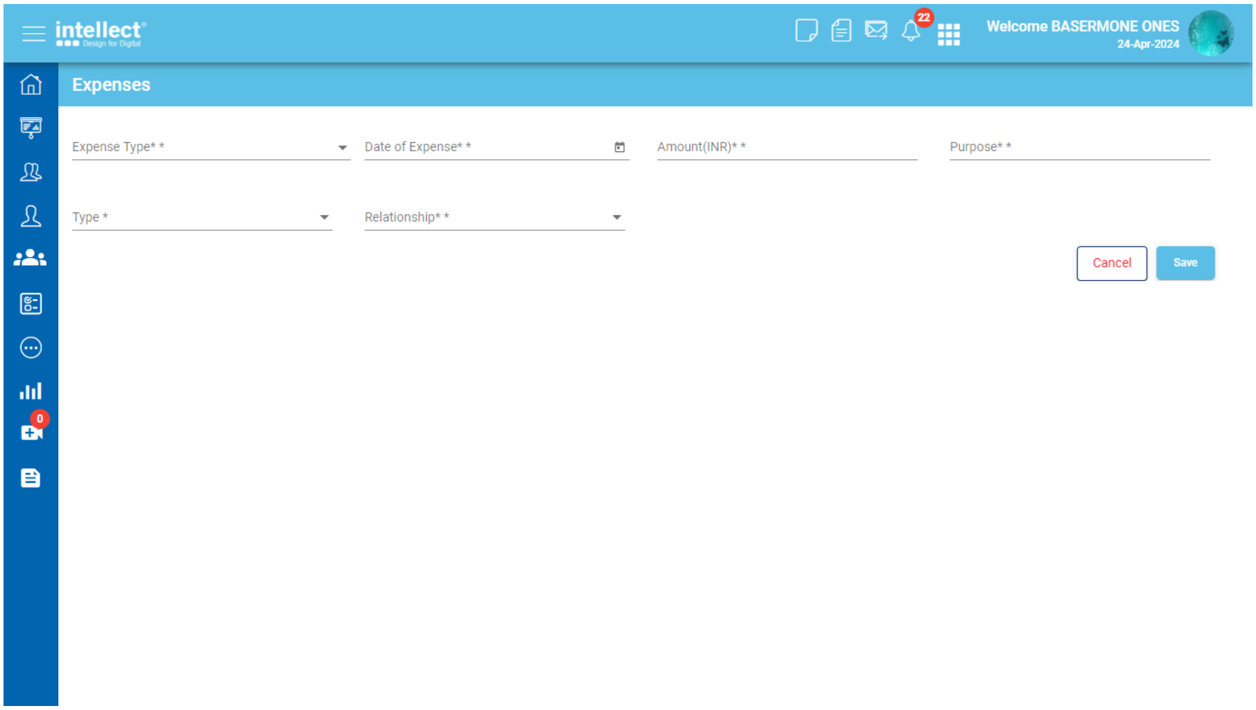
9. To add an expense, RM will click on “Add Expense” button.



Screen – Expense screen

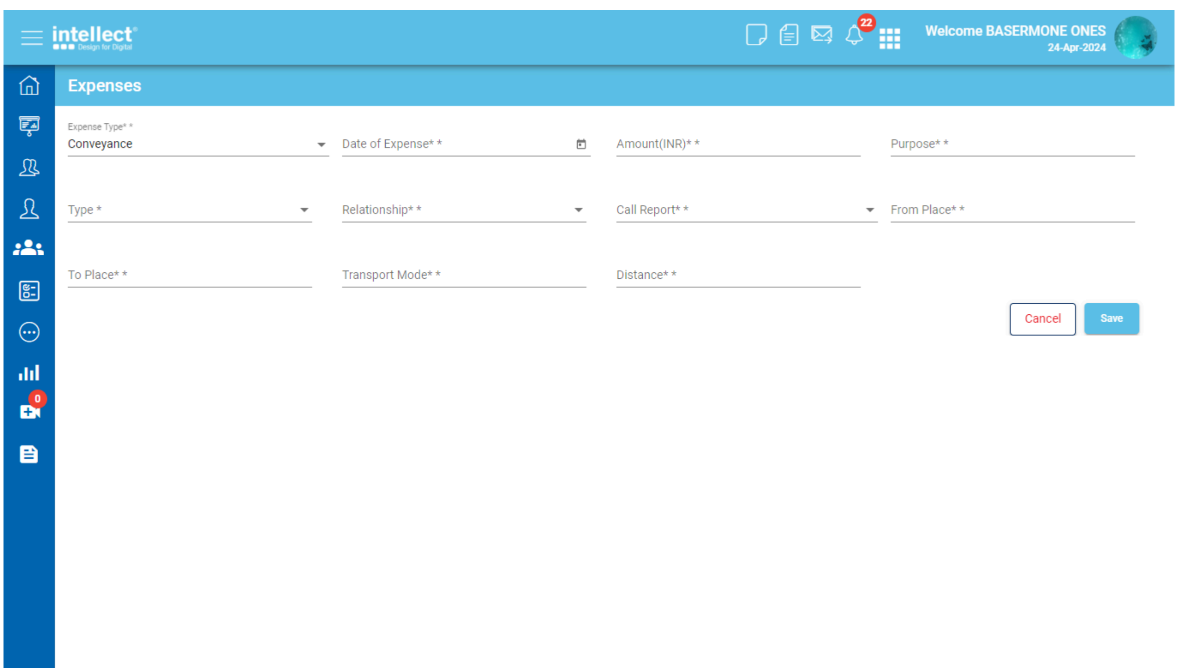
10. The expense capture screen will load up.

11. The expense capture form will have 5 fields – Expense Type, Date of Expense, Amount, Purpose, Type and Customer.



Screen – Capture of expense

12. If the expense type selected is "Conveyance" then 5 more additional fields will be applicable – Call Report, From Place, To Place, Transport Mode and Distance.



Screen – Capture conveyance expense

13. Upon capturing the details, RM will click on "Save" to save the details in the system.

14. There will be no authorization for expense captured in the system.

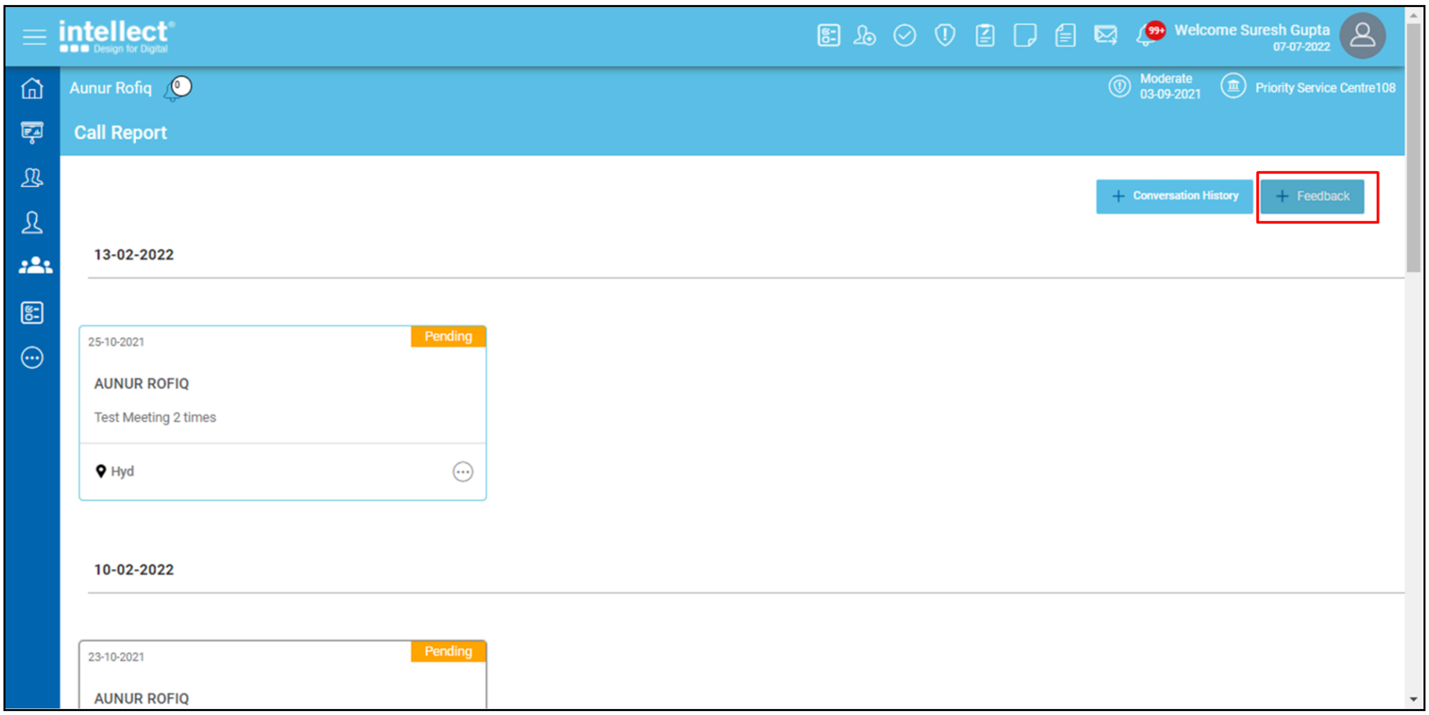
4.8. Feedback

The supervisor can review the call report submitted by the RM and record his feedback from two paths:

a. Customer Dashboard > Call Report Screen>Feedback

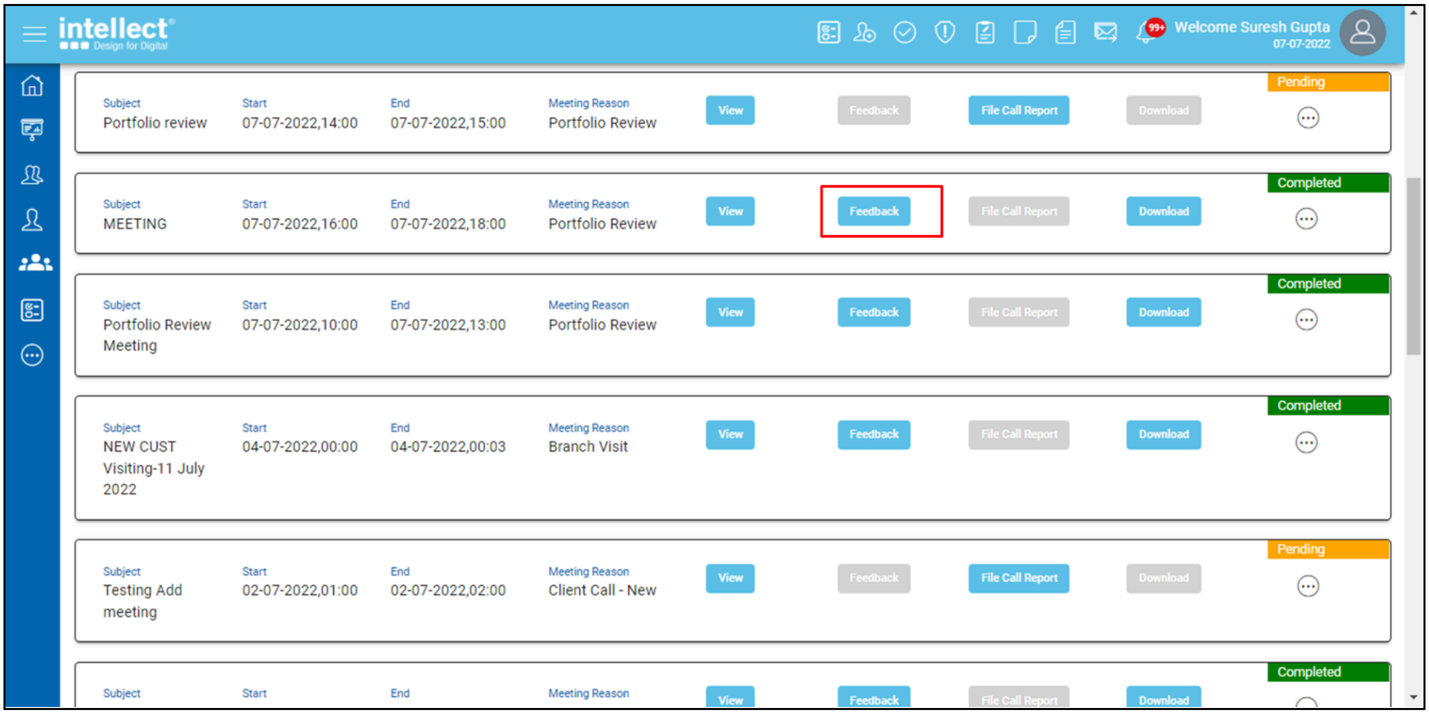
b. Calendar Screen>Call Report >Feedback

1. Feedback (From Customer Dashboard)



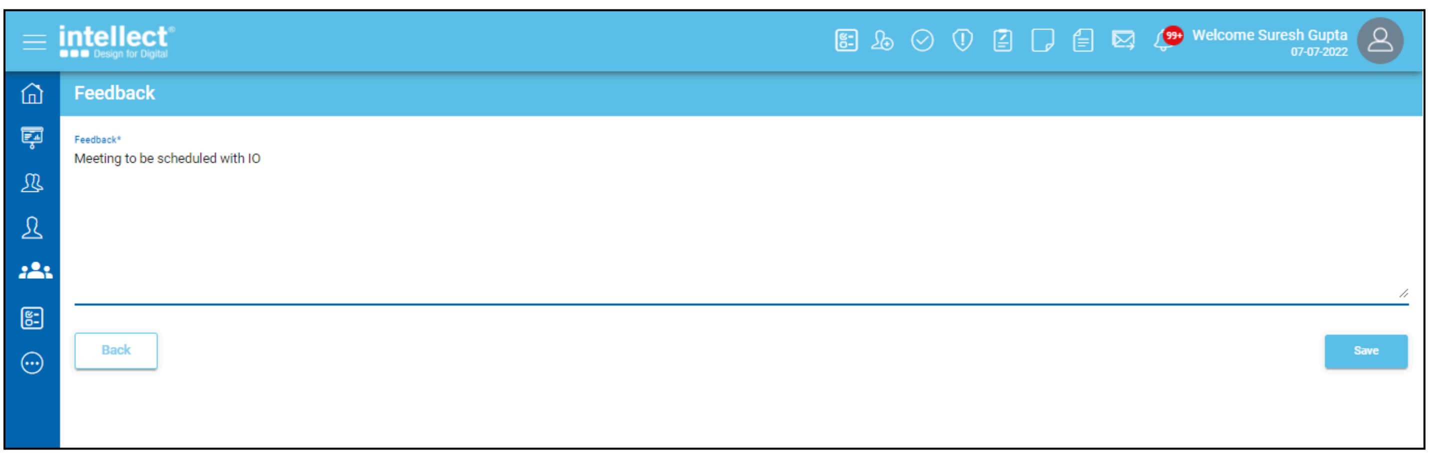
Screen: Navigate to Feedback (Customer Card)

2. Feedback (From Calendar)



Screen: Navigate to Feedback (Calendar)

The Supervisor records the feedback and clicks on “Save” button to save the feedback

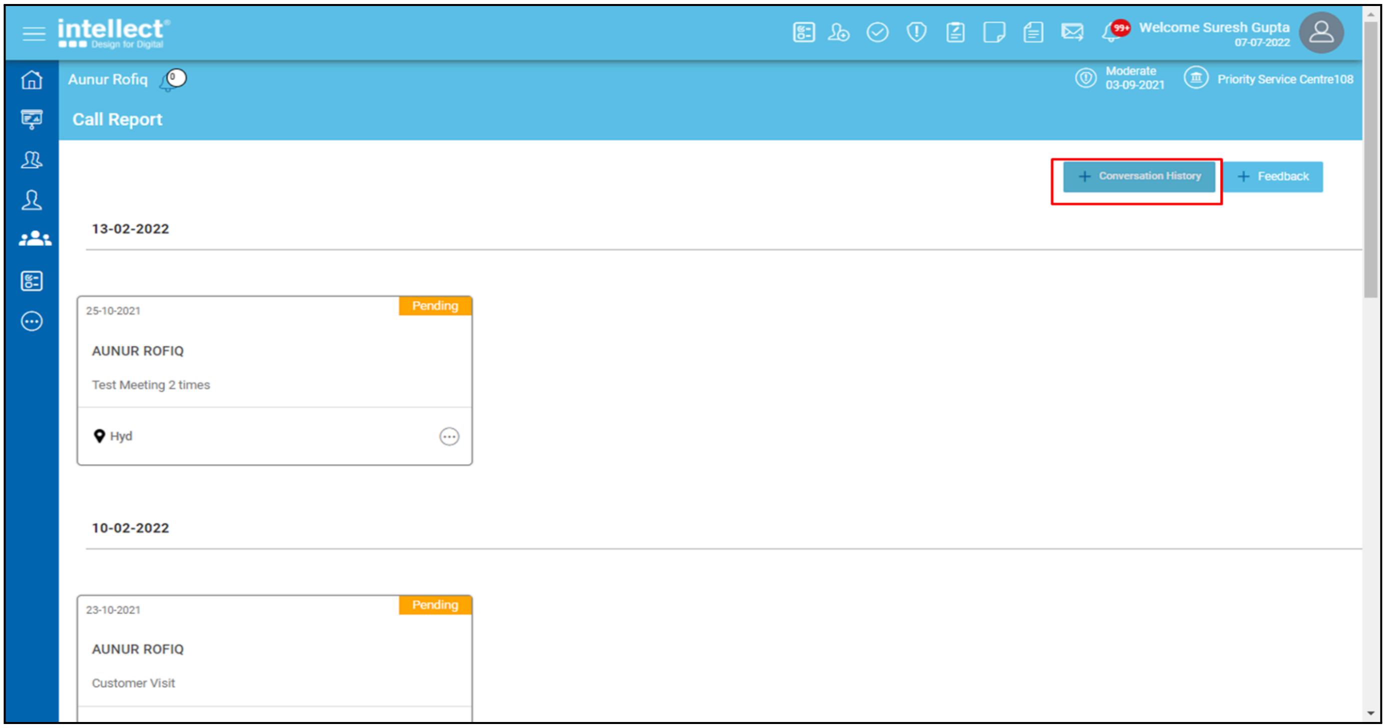


Screen: Record the Feedback

4.9. Conversation History

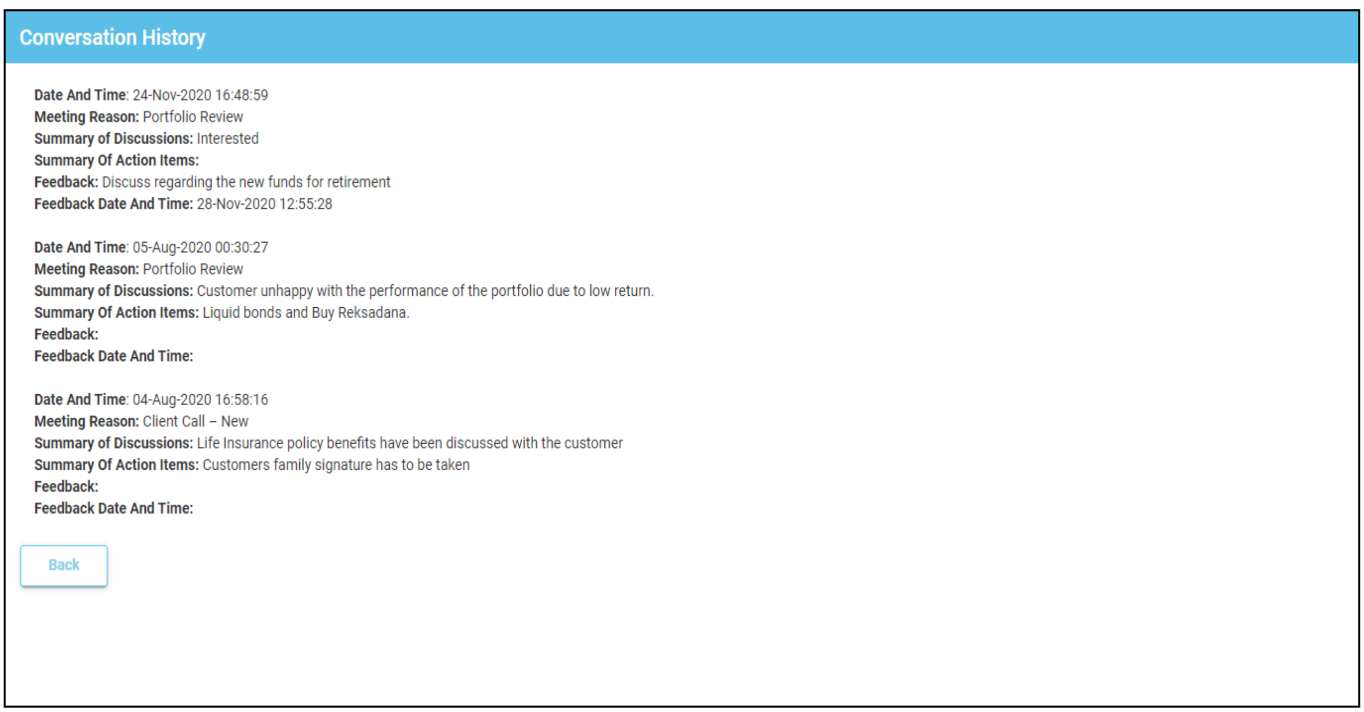
The history of all communications with the customer over the time and supervisor’s feedback if any can be viewed in the conversation history section

1. The User clicks on “Conversation History” tab



Screen: Navigate to Conversation History

2. The User can view the Conversation History details



Screen: View Conversation History Details

5. Field Level Details

S No	Field Name	Field Description	Field Type	Editable	Data Type	Mandatory	List of Values	Remarks
				Schedule a Meeting				
1	Subject	Inputs the Subject of the Meeting	Input	Yes	String	Yes	Not Applicable	
2	Meeting Reason	Selects the reason for the Meeting	Select	Yes	String	Yes	1. Client Call - New 2. Client Call - Existing 3. Branch Visit 4. Portfolio Review 5. Service Request 6. Campaign Details 7. Others	
3	Others	Inputs the Meeting reason if Others was selected in the Meeting Reason field	Input	Yes	String	No	Not Applicable	
4	Location	Inputs the Location of the Meeting	Input	Yes	String	Yes	Not Applicable	
5	Start Date	Inputs the Start Date of the Meeting	Input	Yes	String	Yes	Not Applicable	
6	Start Time	Inputs the Start Time of the Meeting	Input	Yes	String	Yes	Not Applicable	
7	End Date	Inputs the End Date of the Meeting	Input	Yes	String	Yes	Not Applicable	
8	End Time	Inputs the End Time of the Meeting	Input	Yes	String	Yes	Not Applicable	
9	All Day	If the user checks All day, the fields for Start Time, End Date and End Time will be greyed out, signifying that the meeting is being scheduled for the whole day	Select	Yes	Not Applicable	No	Not Applicable	

10	Meeting Type	Selects the Target Audience of the Meeting	Select	Yes	String	Yes	1. CIF 2. Lead 3. Others 4. Prospect	
11	Mode of Meeting	Selects the Mode in which the Meeting will be held	Select	Yes	String	Yes	1. Face-to-Face 2. In-Person 3. In-Person OffShore 4. Others 5. Telephone 6. Telephone Offshore 7. Video Conference 8. Video Conference Offshore	
12	Relationship	Selects the Client/Prospect/Lead or Inputs the Name of the Individual in case of Others with whom the Meeting will be held	Select	Yes	String	Yes	List of Relations (Leads/Prospects/CIFs) would be populated in this field. In Case of Others, it will be a free text field	
13	Contact Details	Whatever Relation has been selected, if it has Contact Details already existing in the system, it will be auto-populated. Otherwise, the User can enter the contact details	Fetch	Yes	String	Yes	Not Applicable	
14	Remarks	Inputs Remarks if any for the Meeting	Input	Yes	String	No	Not Applicable	
15	Required	Selects the User who is required to attend the Meeting	Select	Yes	String	Yes	All the Users in the hierarchy of the User who is logged in	
16	Optional	Selects the Optional Invitees for the Meeting	Select	Yes	String	No	All Users currently maintained in Wealth Qube	
File Call Report								

1	Meeting Reason	Displays/Selects the reason for the Meeting	Fetch	Yes	String	Yes	1. Branch Visit 2. Campaign Details 3. Client Call - Existing 4. Client Call - New 5. Others 6. Portfolio Review 7. Service Request	
2	Subject	Displays/Inputs the Subject of the Meeting	Fetch	Yes	String	Yes	Not Applicable	
3	Start Date	Displays the Start Date of the Meeting	Display	No	String	Yes	Not Applicable	
4	Start Time	Displays the Start Time of the Meeting	Display	No	String	Yes	Not Applicable	
5	End Date	Displays the End Date of the Meeting	Display	No	String	Yes	Not Applicable	
6	End Time	Displays the End Time of the Meeting	Display	No	String	Yes	Not Applicable	
7	Location	Displays the Location of the Meeting	Display	No	String	Yes	Not Applicable	
8	Client Status	Selects the Status of the Client	Select	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 Start Date of the next Meeting	Input	Yes	String	Yes	Not Applicable	
10	Next Meeting Start Time	Inputs the Start Time of the next Meeting	Input	Yes	String	Yes	Not Applicable	
11	Next Meeting End Date	Displays the End Date of the Next Meeting	Computed	No	String	Yes	Not Applicable	
12	Next Meeting End Time	Inputs the End Time of the Next Meeting	Input	Yes	String	Yes	Not Applicable	

13	State of Mind	Selects the State of Mind of the Relation	Select	Yes	String	No	1. Happy 2. Irate 3. Satisfied 4. Sensitive 5. Ultra-Sensitive	
14	Meeting Type	Displays the Target Audience of the Meeting	Display	No	String	Yes	1. CIF 2. Lead 3. Others 4. Prospect	
15	Mode of Meeting	Selects the Mode in which the Meeting was held	Display	No	String	Yes	1. Face-to-Face 2. In-Person 3. In-Person OffShore 4. Others 5. Telephone 6. Telephone Offshore 7. Video Conference 8. Video Conference Offshore	
16	Relationship	Displays the Client/Prospect/Lead/Others with whom the Meeting was held	Display	No	String	Yes	List of Relations(Leads/Prospects/CIFs/Others)	
17	Person Met	Inputs the details of the Person Met	Input	Yes	String	No	Not Applicable	
18	Summary of Discussion	Inputs the Summary of the Discussion held with the Lead/Prospect/Client/Other	Input	Yes	String	Yes	Not Applicable	
19	Remarks	Displays Remarks that were captured	Display	No	String	No	Not Applicable	
20	Opportunity	Inputs the opportunity	Input	Yes	String	No	Not Applicable	
21	Opportunity Date	Inputs the Date of the opportunity	Input	Yes	String	No	Not Applicable	
22	Contact Details	Inputs the contact details of the customer	Input	Yes	Numeric	Yes	Not Applicable	
23	Attendees	Displays the User(s) who attended the Meeting	Display	No	String	Yes	List of Users who are required for the Meeting	

Standalone Call Report

1	Meeting Reason	Selects the reason for the Meeting	Select	Yes	String	Yes	1. Branch Visit 2. Campaign Details 3. Client Call - Existing 4. Client Call - New 5. Others 6. Portfolio Review 7. Service Request	
2	Subject	Inputs the Subject of the Meeting	Input	Yes	String	Yes	Not Applicable	
3	Start Date	Inputs the Start Date of the Meeting	Input	Yes	String	Yes	Not Applicable	
4	Start Time	Inputs the Start Time of the Meeting	Input	Yes	String	Yes	Not Applicable	
5	End Date	Inputs the End Date of the Meeting	Input	Yes	String	Yes	Not Applicable	
6	End Time	Inputs the End Time of the Meeting	Input	Yes	String	Yes	Not Applicable	
7	Location	Inputs the Location of the Meeting	Input	Yes	String	Yes	Not Applicable	
8	Client Status	Selects the Status of the Client	Select	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 Start Date of the next Meeting	Input	Yes	String	Yes	Not Applicable	
10	Next Meeting Start Time	Inputs the Start Time of the next Meeting	Input	Yes	String	Yes	Not Applicable	
11	Next Meeting End Date	Displays the End Date of the Next Meeting	Compute d	No	String	Yes	Not Applicable	
12	Next Meeting End Time	Inputs the End Time of the Next Meeting	Input	Yes	String	Yes	Not Applicable	

13	State of Mind	Selects the State of Mind of the Relation	Select	Yes	String	No	1. Happy 2. Irate 3. Satisfied 4. Sensitive 5. Ultra-Sensitive	
14	Meeting Type	Selects the Target Audience of the Meeting	Select	Yes	String	Yes	1. CIF 2. Lead 3. Others 4. Prospect	
15	Mode of Meeting	Selects the Mode in which the Meeting was held	Select	Yes	String	Yes	1. Face-to-Face 2. In-Person 3. In-Person OffShore 4. Others 5. Telephone 6. Telephone Offshore 7. Video Conference 8. Video Conference Offshore	
16	Relationship	Selects the Client/Prospect/Lead or Inputs Others with whom the Meeting was held	Select/Input	Yes	String	Yes	List of Relations(Leads/Prospects/CIFs/Others)	
17	Person Met	Inputs the details of the Person Met	Input	Yes	String	No	Not Applicable	
18	Summary of Discussion	Inputs the Summary of the Discussion held with the Lead/Prospect/Client/Other	Input	Yes	String	Yes	Not Applicable	
19	Remarks	Displays Remarks that were captured	Input	Yes	String	No	Not Applicable	
20	Opportunity	Inputs the opportunity	Input	Yes	String	No	Not Applicable	
21	Opportunity Date	Inputs the Date of the opportunity	Input	Yes	String	No	Not Applicable	
22	Contact Details	Inputs the contact details of the customer	Input	Yes	Numeric	Yes	Not Applicable	

23	Attendees	Selects the User(s) who attended the Meeting	Select	Yes	String	Yes	All the Users in the hierarchy of the User who is logged in	

SNo	Field Name	Field Description	Field Type	Editable	Data Type	Mandatory	List of Values	Remarks
				Opportunity				
1	Type	This will capture if the entity is a prospect/CIF	Select	Yes	String	Yes	1. Prospect 2. CIF	
2	Relationship	If the Type selected is “Prospect”, this will capture the name of the prospect for which the opportunity is captured If the Type selected is “CIF”, this will capture the name of the customer for which the opportunity is captured	Select	Yes	String	Yes	List of Prospect and CIF	
3	Sub Product	This will capture the sub product for which the opportunity will be captured	Select	Yes	String	Yes	List of Sub products	
4	Investment Mode	This will capture the transaction type for against which the opportunity is discovered	Select	Yes	String	Yes	Lump Sum/Periodic	
5	Opportunity Discovered (INR)	This will capture the opportunity amount discovered	Input	Yes	Number	Yes	Not Applicable	
6	Opportunity Date	This will capture the opportunity date	Select	Yes	String	Yes	Not Applicable	
7	Opportunity Description	This will capture the opportunity description	Input	Yes	String	No	Not Applicable	

8	Due Date	This will capture the date on which the opportunity is due	Select	Yes	String	Yes	Not Applicable	
9	Opportunity Closed (INR)	This will capture the opportunity amount closed in the meeting	Input	Yes	Number	No	Not Applicable	
10	Status	This will capture the status of the opportunity	Select	Yes	String	Yes	1. Open 2. Closed 3. Aborted 4. Expired	
11	Stage	This will capture the stage of the opportunity	Select	Yes	String	Yes	1. Interested 2. To be approached 3. Won – Documentation in Process 4. Won – Documentation completed 5. Declined 6. Not Proceeding	
12	Call Report	This will provide a provision to select the call report filed in the system to be associated with the opportunity	Select	Yes	String	No	List of call report for the customer selected in the previous filed	
Feedback								
1	Feedback		Input	Yes	String	Yes	Not Applicable	
Conversation History								
1	Date And Time	Display the Date and Time of conversation captured	Display	No	String	Not Applicable	Not Applicable	
2	Meeting Reason	Display the Meeting reason	Display	No	Character	Not Applicable	1. Branch Visit 2. Campaign Details 3. Client Call - Existing 4. Client Call - New 5. Others 6. Portfolio Review 7. Service Request	

3	Summary of Discussions:	Display the summary discussion	Display	No	String	Not Applicable	Not Applicable	
4	Opportunity	Display the Opportunity captured	Display	No	String	Not Applicable	Not Applicable	
5	Feedback	Display the Feedback captured on the call report	Display	No	String	Not Applicable	Not Applicable	
6	Feedback Date And Time	Display the Feedback date and time for the call report	Display	No	String	Not Applicable	Not Applicable	

Expense Capture

Sl No	Field Name	New Field Name	Field Description	Field Type	Editable	Data Type	Mandatory	List of Values
1	Meeting Reason	This will capture the purpose of the meeting	Select	No	String	Yes	1. Branch Visit 2. Campaign Details 3. Client Call – Existing 4. Client Call – New 5. Others	Not Applicable
2	Subject	This will capture the subject of the meeting	Input	No	String	Yes	Not Applicable	Not Applicable
3	Start Date	This will capture the start date of the meeting	Select	No	String	Yes	Date Picker	Not Applicable
4	Start Time	This will capture the start time of the meeting	Select	No	String	Yes	Clock	Not Applicable
5	End Date	This will display the end date of the meeting	Display	No	String	Yes	Date Picker	Not Applicable
6	End Time	This will capture the end time of the meeting	Select	No	String	Yes	Clock	Not Applicable
7	Location	This will capture the location where RM will meet the customer	Input	No	String	Yes	Not Applicable	Not Applicable

8	Client Status	This will capture the status of the customer in case the meeting couldn't take place	Select	No	String	No	1. None 2. Client Abroad, Email Taken 3. Conference Call 4. Not Contactable 5. Not Interested In Bank Services	Not Applicable
9	Next Meeting Start Date	This captures the date on which the next meeting is scheduled	Select	No	String	No	Date Picker	Not Applicable
10	Next Meeting Start Time	This will capture the time at which the next meeting is scheduled	Select	No	String	No	Clock	Not Applicable
11	Next Meeting End Date	This will display the end date of the next meeting scheduled	Display	No	String	No	Date Picker	Not Applicable
12	Next Meeting End Time	This will capture the end time of the next meeting scheduled	Select	No	String	No	Date Picker	Not Applicable
13	State of Mind	This will capture the state of mind of the customer	Select	No	String	No	1. None 2. Happy 3. Irate 4. Satisfied 5. Sensitive	Not Applicable
Meeting Information								
14	Meeting Type	The will capture the entity for which the meeting was scheduled	Select	No	String	Yes	1. CIF 2. Lead 3. Others 4. Prospect	Not Applicable
15	Mode of Meeting	This will capture the mode on which the meeting was conducted	Select	No	String	Yes	1. Face to Face 2. In Person 3. In Person Off Shore 4. Others 5. Telephone	Not Applicable

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

7. Actors/Entitlements

1. RM
2. Supervisor
3. IO

8. Annexure

Not Applicable

9. Glossary

1. The terms RM Office and PMS refer to the same application and have been used interchangeably throughout this document