

Journey of RM from Customer Meeting to Closure of Action Items

HSBS PWS

COPYRIGHT NOTICE

Copyright © 2022 Intellect Design Arena Limited

all rights reserved. These materials are confidential and proprietary and no part of these materials should be reproduced, published in any form by any means, electronic or mechanical including photocopy or any information storage or retrieval system nor should the materials be disclosed to third parties without the express written authorization of Intellect Design Arena Limited.

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	6
2.	Prerequisites	6
3.	Flow Diagram	6
4.	Process Description	7
4.1	Login	7
4.2	Schedule a Meeting	8
4.3	Call Report	15
4.3.1	Filing a Call Report	15
4.3.2.	File Call Report	21
4.3.3.	Standalone Call Report	23
4.3.3.1.	Standalone Call Report (From Customer Dashboard)	23
4.3.3.2.	Standalone Call Report (From Calendar)	24
4.4.	Opportunity	28
4.4.1	Add an Opportunity	28
4.4.2	View an Opportunity	30
4.4.3	Modify an Opportunity	36
4.5.	Opportunity File Upload	38
4.6.	Call Report Approval	41
4.7.	Expense Capture	52
4.8.	Feedback	55
4.8.1.	Feedback (From Customer Dashboard)	55
4.8.2.	Feedback (From Calendar)	55
4.9.	Conversation History	56
5.	Field Level Details	58
6.	Validations	67
7.	Actors/Entitlements	67
8.	Annexure	67
9.	Glossary	68

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

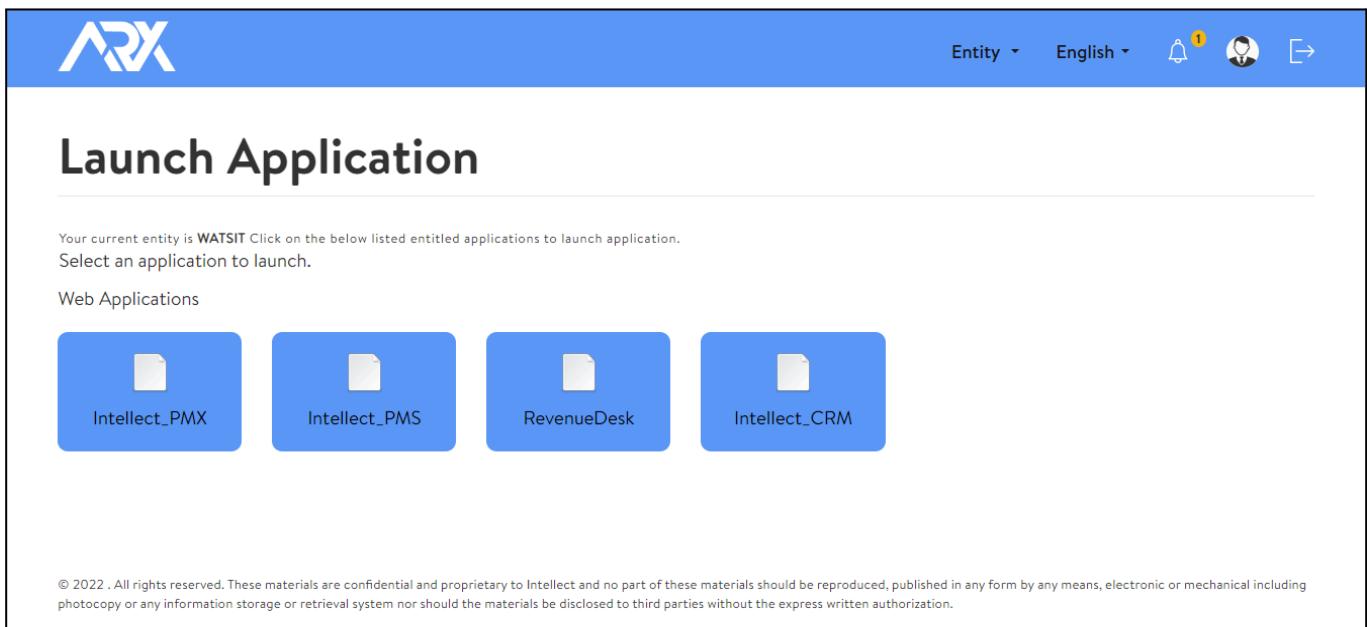
4.1 Login

- The User enters their credentials and logs into the application



Screen: Launch the application

- Once logged in, the User clicks on “RM Office” to launch the PMS application

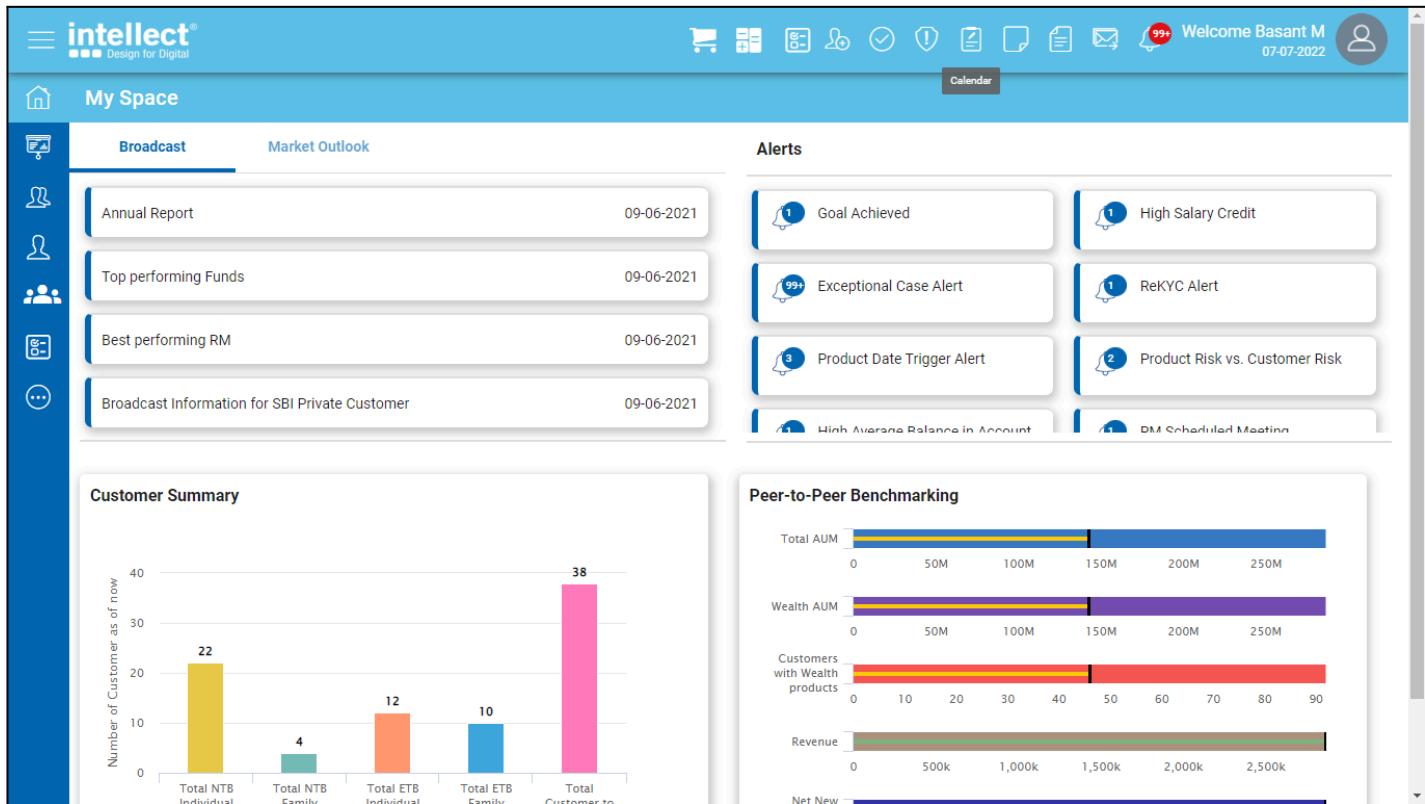


Screen: Select RM office

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



The screenshot shows the Intellect My Space dashboard. On the left is a vertical sidebar with icons for Home, Broadcast, Market Outlook, Alerts, Customer Summary, and Peer-to-Peer Benchmarking. The main area has several sections:

- Broadcast:** Lists "Annual Report" (09-06-2021), "Top performing Funds" (09-06-2021), "Best performing RM" (09-06-2021), and "Broadcast Information for SBI Private Customer" (09-06-2021).
- Market Outlook:** Not visible in the screenshot.
- Alerts:** Shows six alerts: "Goal Achieved", "High Salary Credit", "Exceptional Case Alert", "ReKYC Alert", "Product Date Trigger Alert", and "Product Risk vs. Customer Risk". It also shows "High Average Balance in Account" and "DM Scheduled Meeting".
- Customer Summary:** A bar chart titled "Customer Summary" showing the number of customers as of now. The data is as follows:

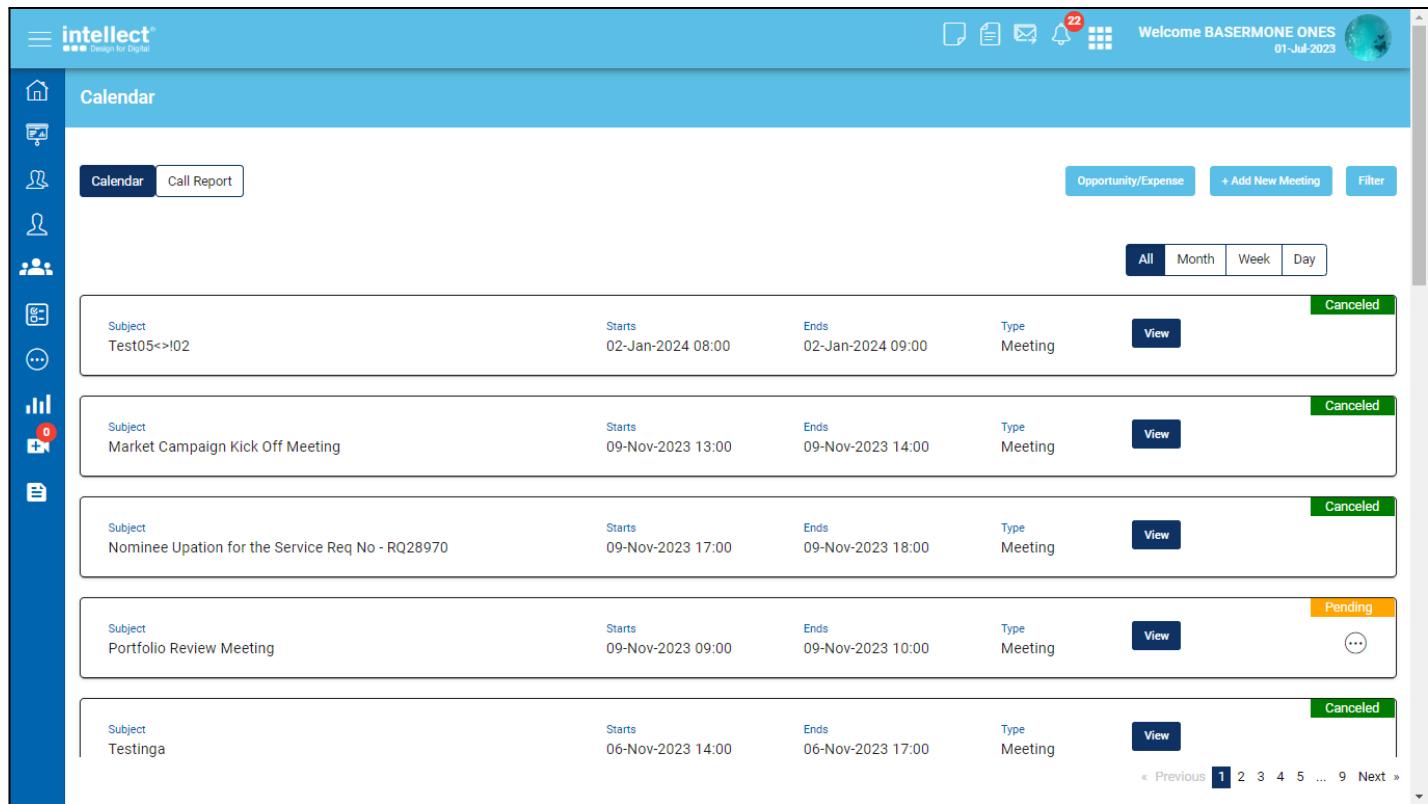
Category	Value
Total NTB Individual	22
Total NTB Family	4
Total ETB Individual	12
Total ETB Family	10
Total Customer to	38
- Peer-to-Peer Benchmarking:** A section with five horizontal bar charts comparing performance metrics across different categories. The data is as follows:

Metric	Value
Total AUM	~220M
Wealth AUM	~180M
Customers with Wealth products	~85
Revenue	~2,200k
Net New	~2,500k

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



Subject: Test05<>I02 Starts: 02-Jan-2024 08:00 Ends: 02-Jan-2024 09:00 Type: Meeting Status: Canceled

Subject: Market Campaign Kick Off Meeting Starts: 09-Nov-2023 13:00 Ends: 09-Nov-2023 14:00 Type: Meeting Status: Canceled

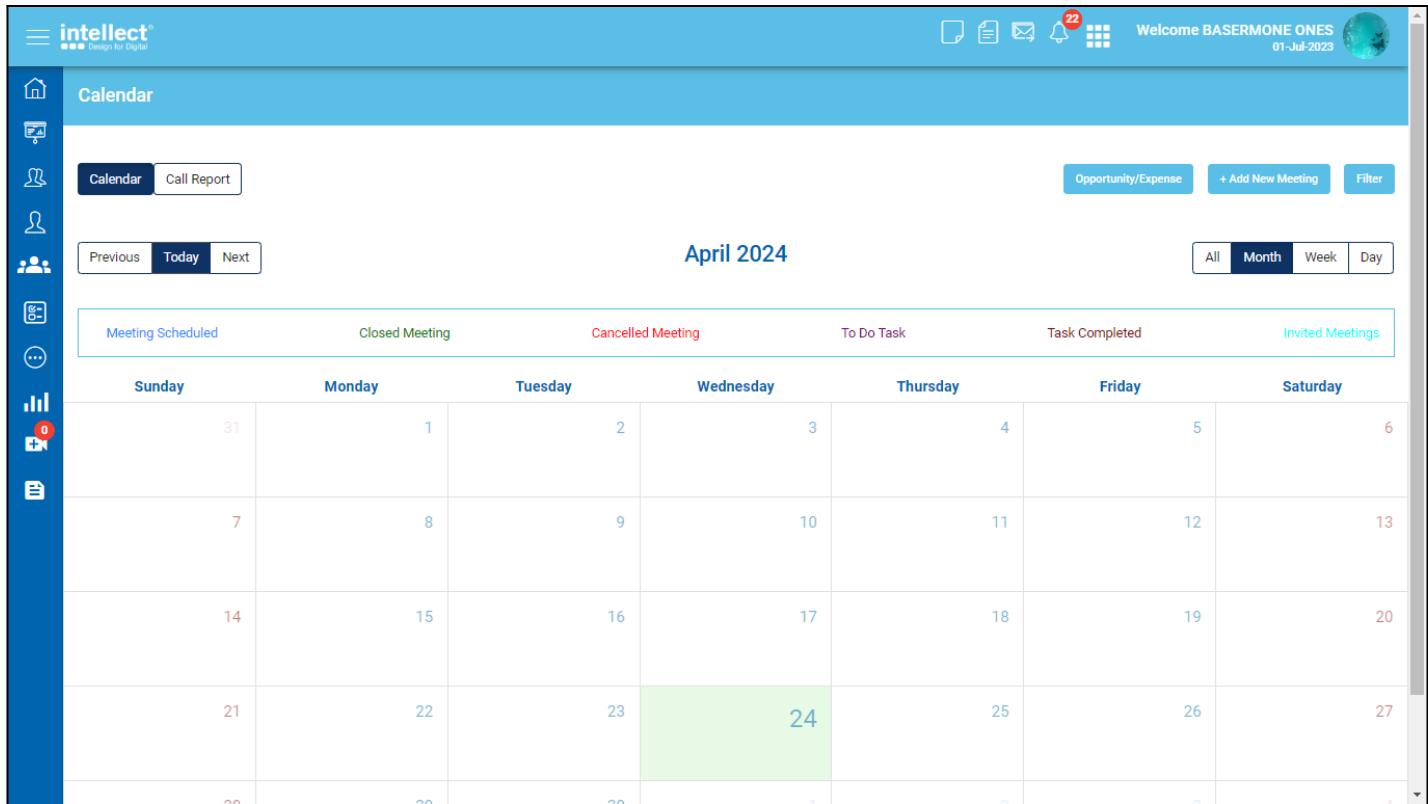
Subject: Nominee Upation for the Service Req No - RQ28970 Starts: 09-Nov-2023 17:00 Ends: 09-Nov-2023 18:00 Type: Meeting Status: Canceled

Subject: Portfolio Review Meeting Starts: 09-Nov-2023 09:00 Ends: 09-Nov-2023 10:00 Type: Meeting Status: Pending

Subject: Testinga Starts: 06-Nov-2023 14:00 Ends: 06-Nov-2023 17:00 Type: Meeting Status: Canceled

Screen: All Meetings View

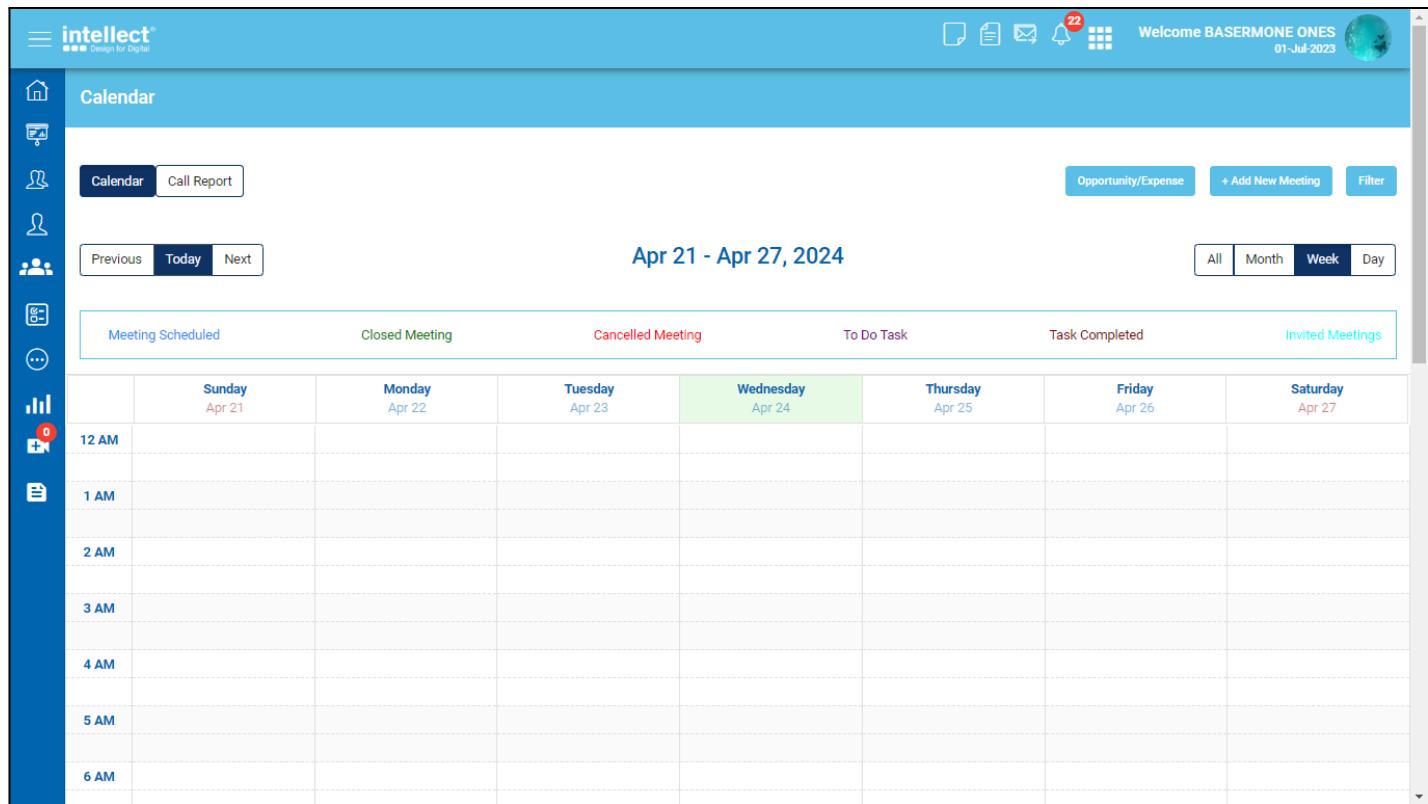
- b. Month – Scheduled Meetings for the Month are shown



The screenshot shows the intellect software's calendar interface. At the top, there is a header bar with the intellect logo, a navigation menu, and various icons for file operations (New, Open, Save, Print, Copy, Paste, Find, Refresh, Undo, Redo) and system status (Welcome BASEMONE ONES, 01-Jul-2023, and a user profile icon). Below the header is a toolbar with buttons for 'Calendar' (selected), 'Call Report', 'Opportunity/Expense', '+ Add New Meeting', and 'Filter'. There are also buttons for 'Previous', 'Today' (selected), and 'Next'. The main area displays the month of April 2024. The days of the week are labeled at the top: Sunday, Monday, Tuesday, Wednesday, Thursday, Friday, Saturday. The days of the month are numbered sequentially. A light blue background highlights the days from April 21 to April 24. Below the calendar, there is a legend with six categories: 'Meeting Scheduled' (blue), 'Closed Meeting' (orange), 'Cancelled Meeting' (red), 'To Do Task' (green), 'Task Completed' (purple), and 'Invited Meetings' (yellow). On the far left, a vertical sidebar contains icons for Home, Calendar, Call Report, Filter, Opportunity/Expense, + Add New Meeting, and Filter.

Screen: Monthly Meetings View

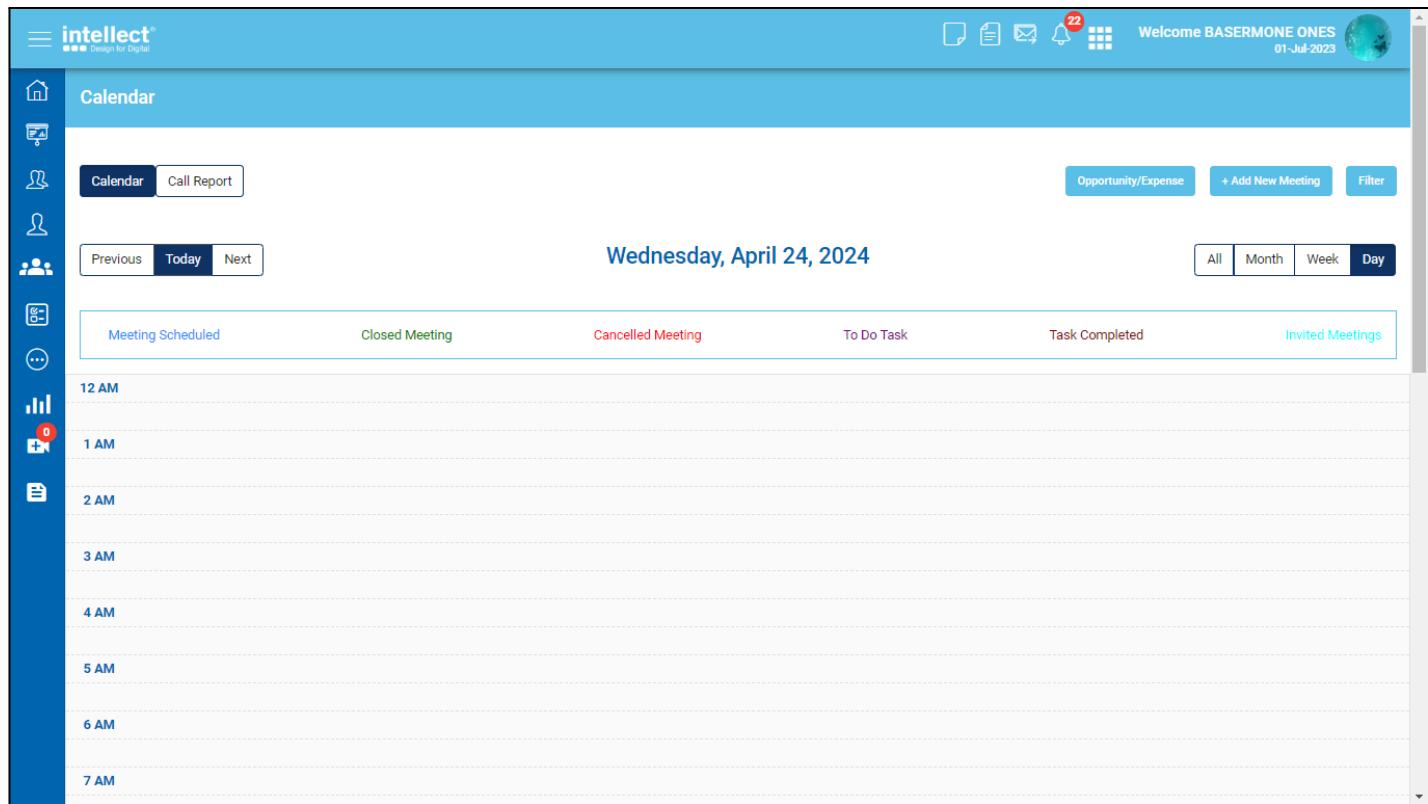
c. Week – Scheduled Meetings for the Week are shown



The screenshot displays the intellect software's calendar module. At the top, there's a header with the intellect logo, a search bar, and a user profile for 'BASERMONE ONES' dated '01-Jul-2023'. Below the header is a navigation bar with icons for Home, Calendar, Call Report, and other functions. The main area is titled 'Calendar' and shows a weekly view from April 21 to April 27, 2024. The days of the week are labeled at the top: Sunday (Apr 21), Monday (Apr 22), Tuesday (Apr 23), Wednesday (Apr 24), Thursday (Apr 25), Friday (Apr 26), and Saturday (Apr 27). The time axis is on the left, ranging from 12 AM to 6 AM. The calendar grid is empty, indicating no scheduled meetings for the specified dates.

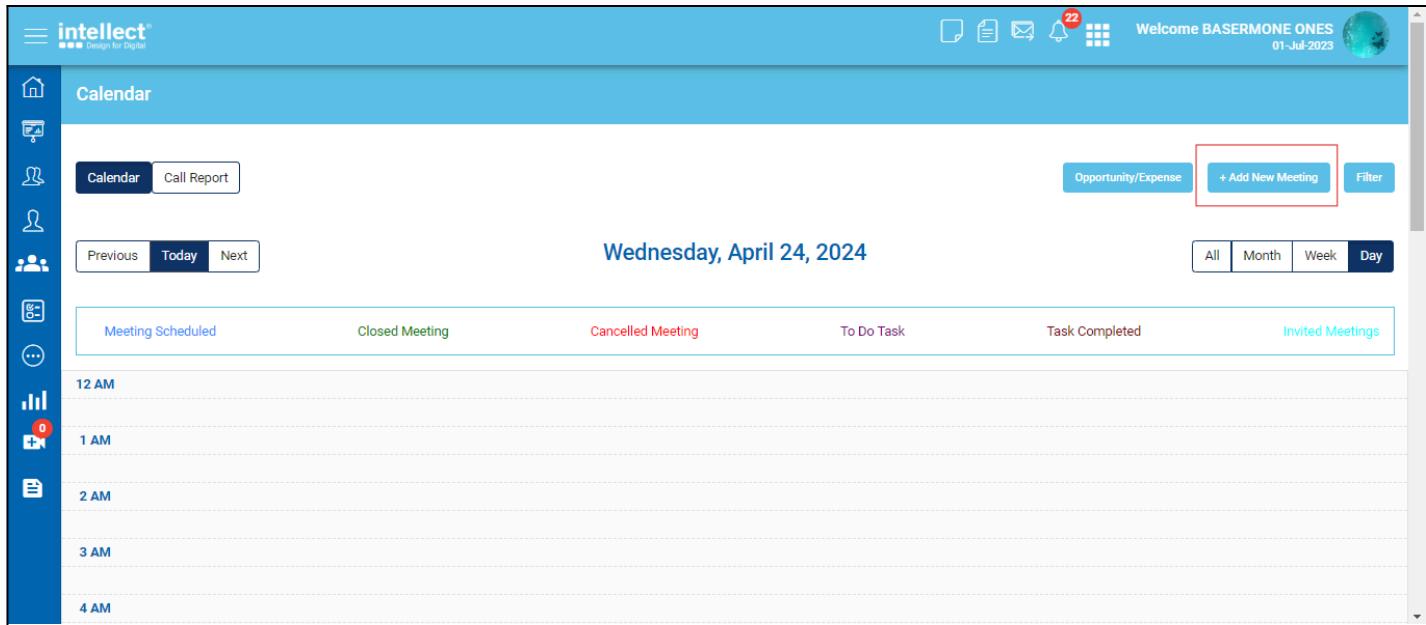
Screen: Weekly Meetings View

d. Day – Scheduled Meetings for the Day are shown



Screen: Day's Meetings View

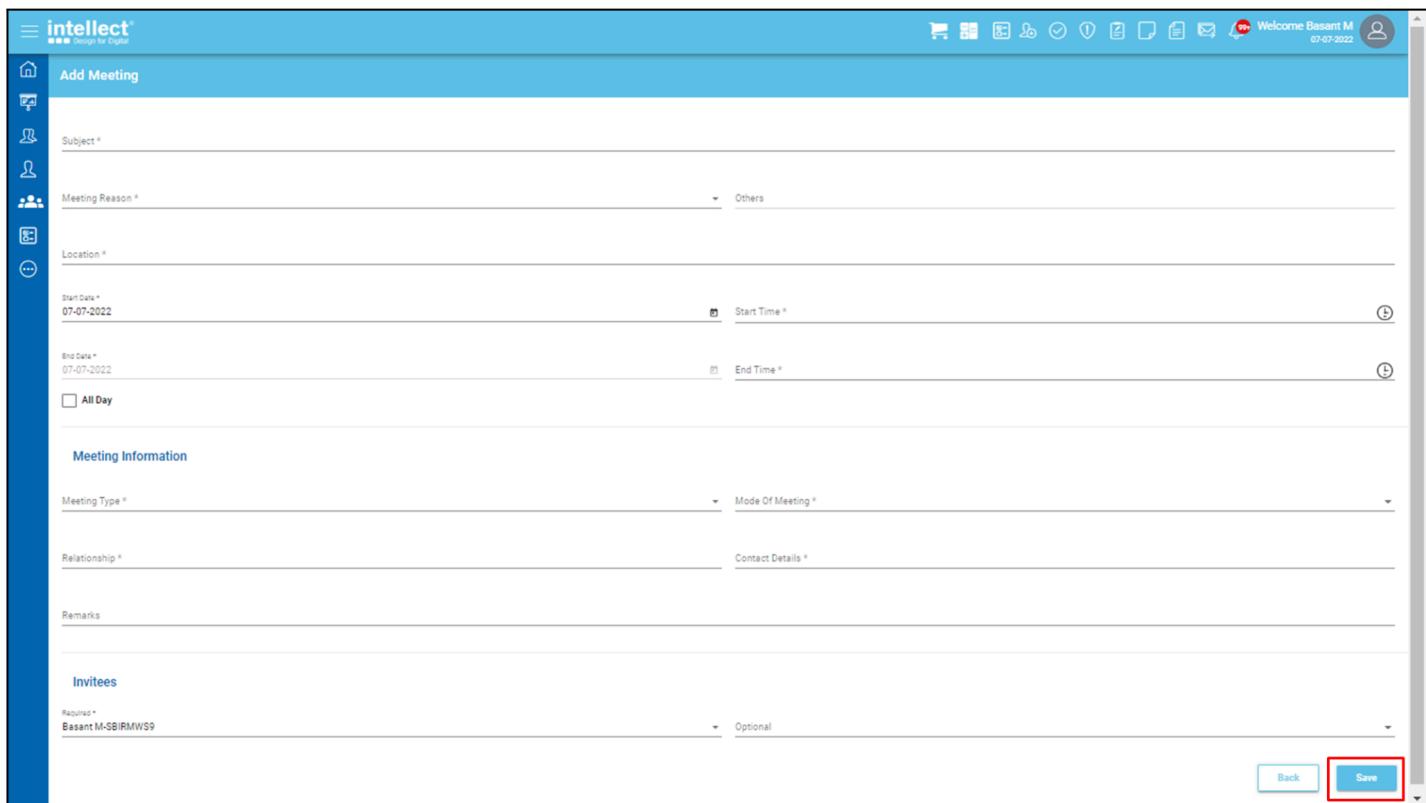
3. Here, the User can perform the following actions:
 - a. Call Report – File a Standalone Call Report for unscheduled meetings (refer section Standalone Call Report for details)
 - b. Add New Meeting – Schedule a Meeting with the Customer/Lead/Prospect
4. The User then clicks on the “Add New Meeting”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



The screenshot shows the intellect Design for Digital calendar interface. At the top right, it says "Welcome BASERMON ONE'S 01-Jul-2023". Below the header are various icons for file operations (New, Open, Save, Print, Copy, Paste, Find, Refresh, Undo, Redo) and notifications (22). The main area is titled "Calendar" and shows a weekly view for Wednesday, April 24, 2024. The time axis ranges from 12 AM to 4 AM. Buttons at the top right include "Opportunity/Expense", "+ Add New Meeting" (which is highlighted with a red box), and "Filter". Below the date, there are buttons for "All", "Month", "Week", and "Day". A horizontal bar at the bottom of the calendar section includes links for "Meeting Scheduled", "Closed Meeting", "Cancelled Meeting", "To Do Task", "Task Completed", and "Invited Meetings". On the far left, a vertical sidebar contains icons for Home, Calendar, Call Report, People, and other system functions.

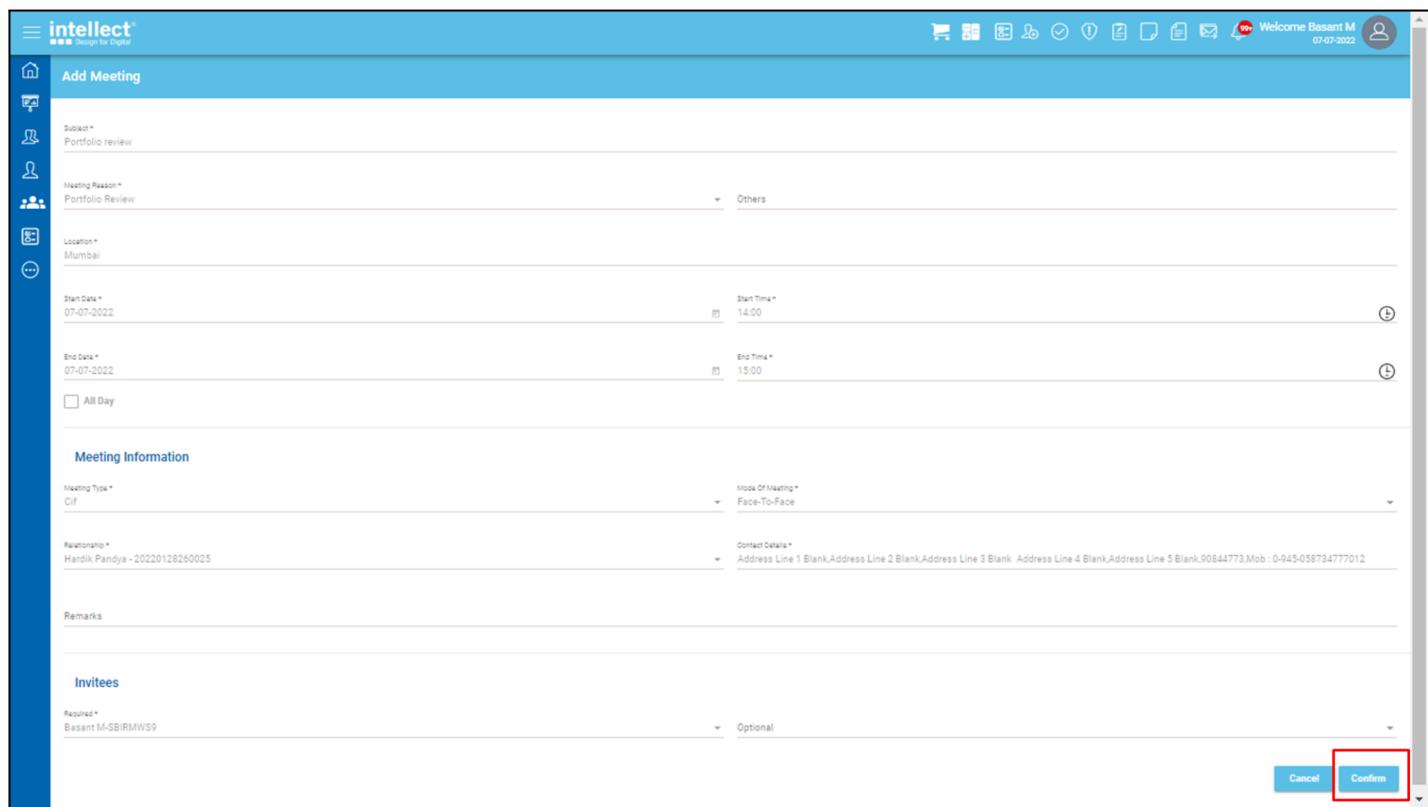
Screen: Click on Add New Meeting

- 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



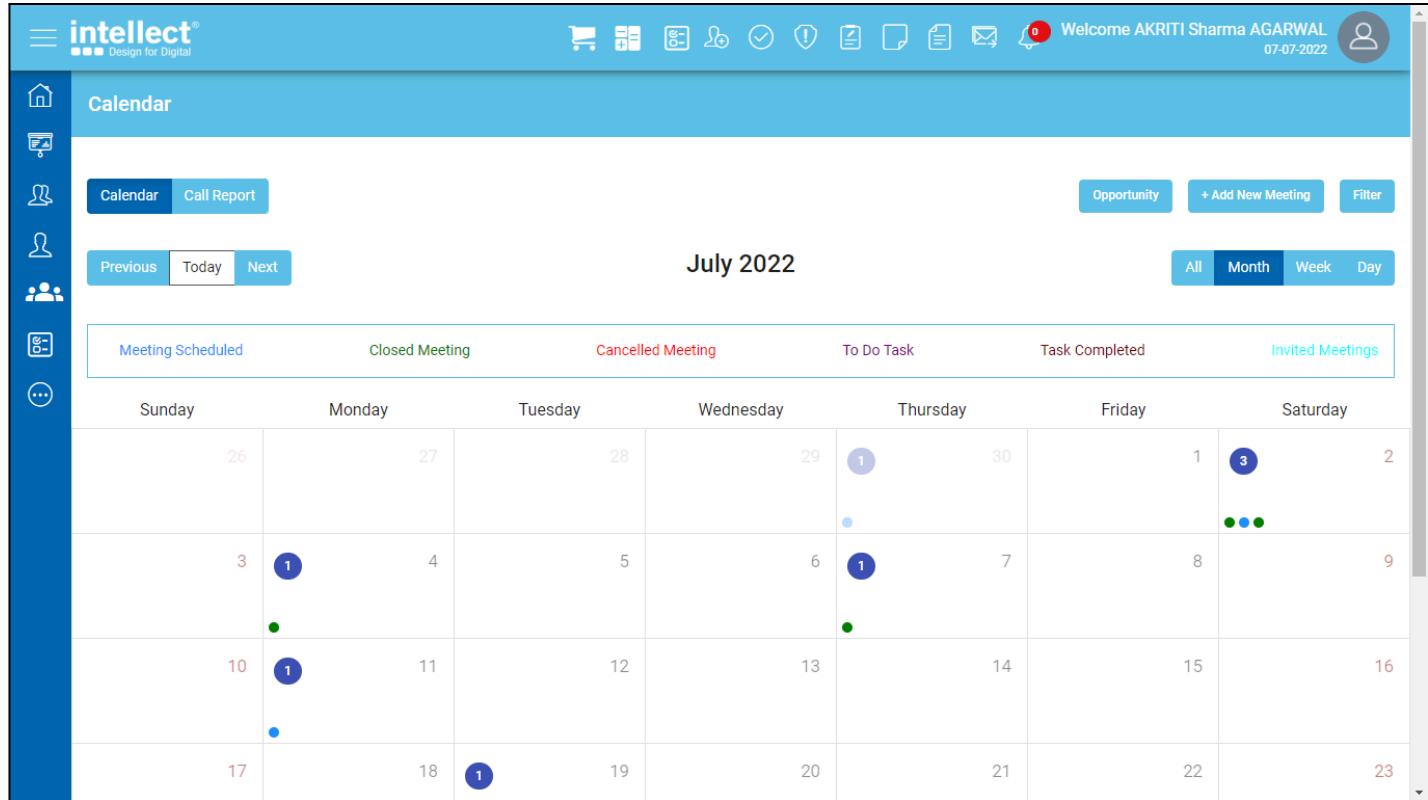
The screenshot shows the "Add Meeting" form. At the top right, it says "Welcome Basant M 07-07-2022". The form has sections for "Subject" (with a required asterisk), "Meeting Reason" (dropdown with "Others" selected), "Location" (text input), "Start Date" (07-07-2022), "End Date" (07-07-2022), "All Day" (checkbox), "Start Time" (dropdown), "End Time" (dropdown), "Meeting Information" (sections for "Meeting Type" and "Mode Of Meeting"), "Relationship" (text input), "Contact Details" (text input), "Remarks" (text input), and "Invitees" (list box showing "Basant M-SBRMWS9" with "Required" checked and "Optional" dropdown). At the bottom right, there are "Back" and "Save" buttons, with "Save" being highlighted with a red box.

Screen: Click on Save



Screen: Click on Confirm

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



The screenshot shows the intellect software interface with the following details:

- Top Bar:** Welcome AKRITI Sharma AGARWAL, 07-07-2022.
- Left Sidebar:** Icons for Home, Calendar, Call Report, and other features.
- Header:** Calendar, with tabs for Calendar and Call Report.
- Buttons:** Opportunity, + Add New Meeting, Filter.
- Navigation:** Previous, Today, Next, All, Month, Week, Day.
- Legend:** Meeting Scheduled (blue), Closed Meeting (green), Cancelled Meeting (red), To Do Task (light blue), Task Completed (dark blue), Invited Meetings (purple).
- Calendar Grid:** July 2022. Key events include:
 - Sunday: 26 (Meeting Scheduled), 30 (Meeting Scheduled).
 - Monday: 1 (Meeting Scheduled), 2 (Meeting Scheduled).
 - Tuesday: 27 (Meeting Scheduled), 28 (Meeting Scheduled), 29 (Meeting Scheduled), 3 (Meeting Scheduled), 4 (Meeting Scheduled).
 - Wednesday: 5 (Meeting Scheduled), 6 (Meeting Scheduled), 10 (Meeting Scheduled), 11 (Meeting Scheduled), 12 (Meeting Scheduled), 13 (Meeting Scheduled), 18 (Meeting Scheduled), 19 (Meeting Scheduled).
 - Thursday: 1 (Meeting Scheduled), 2 (Meeting Scheduled), 6 (Meeting Scheduled), 7 (Meeting Scheduled), 14 (Meeting Scheduled).
 - Friday: 1 (Meeting Scheduled), 2 (Meeting Scheduled), 8 (Meeting Scheduled), 9 (Meeting Scheduled), 15 (Meeting Scheduled).
 - Saturday: 1 (Meeting Scheduled), 2 (Meeting Scheduled), 3 (Meeting Scheduled), 4 (Meeting Scheduled), 8 (Meeting Scheduled), 9 (Meeting Scheduled), 16 (Meeting Scheduled), 22 (Meeting Scheduled), 23 (Meeting Scheduled).

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:

- Call Reports help Relationship Managers to make note of customer needs and address them accordingly in a timely manner
- 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
- 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
- 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

- 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

My Space

Broadcast Market Outlook

- Annual Report 09-06-2021
- Top performing Funds 09-06-2021
- Best performing RM 09-06-2021
- Broadcast Information for SBI Private Customer 09-06-2021

Alerts

- Goal Achieved
- High Salary Credit
- Exceptional Case Alert
- ReKYC Alert
- Product Date Trigger Alert
- Product Risk vs. Customer Risk
- High Average Balance in Account
- RM Scheduled Meeting

Customer Summary

Category	Count
Total NTB Individual Customer	22
Total NTB Family Customer	4
Total ETB Individual Customer	12
Total ETB Family Customer	10
Total Customer to be mapped	38

Peer-to-Peer Benchmarking

Category	Value
Total AUM	~280M
Wealth AUM	~180M
Customers with Wealth Products	~85
Revenue	~1800k
Net New Money	~140M

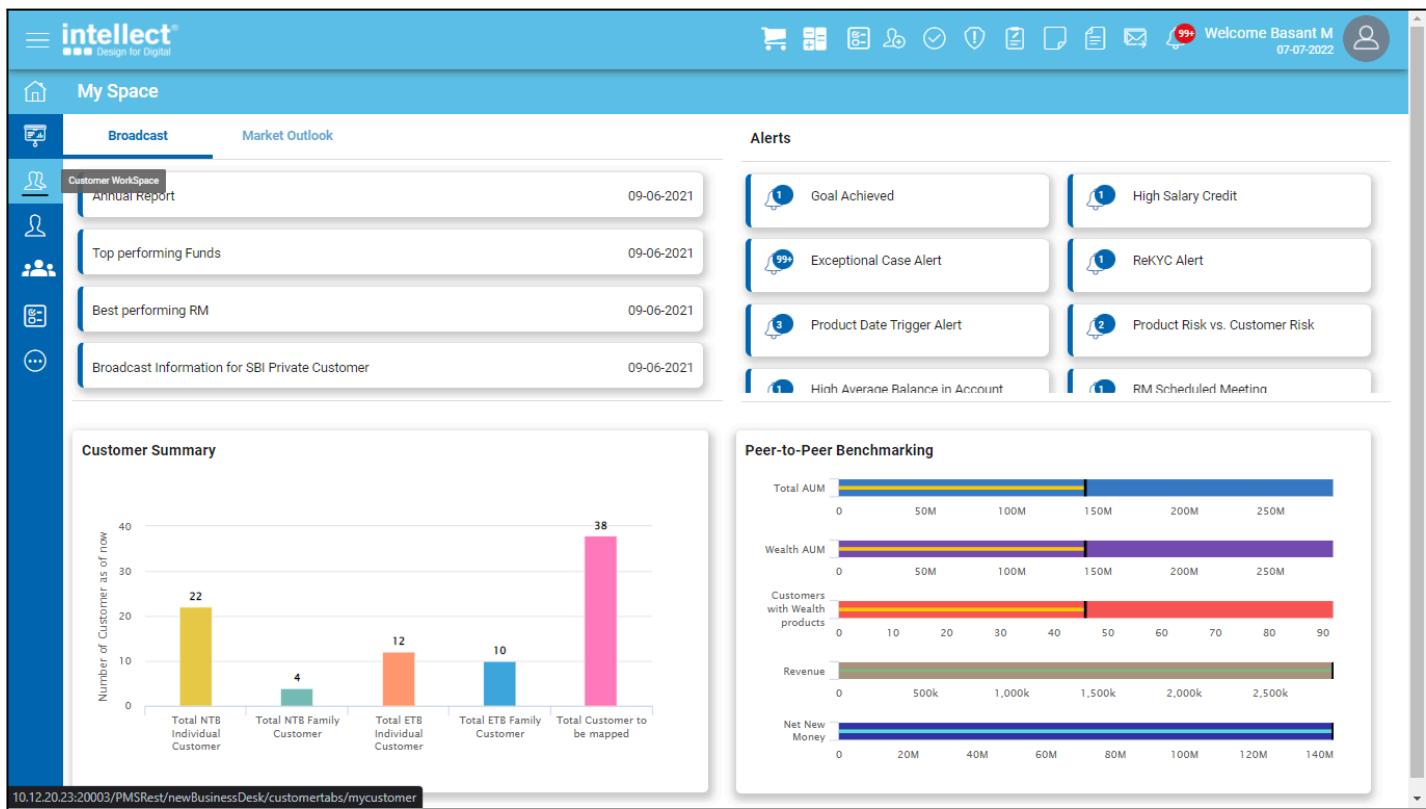
Screen: Click on My Customers

My Customers

Favourite Customer AUM ▾ Product Type ▾ HNW ▾ RM Name ▾ Sort by

Customer	Modified	Authorized	Authorized	Authorized	Authorized
Vijendra Raghuvir Des...					
Vijendra Sharma					
Vijendra Shivhare					
Vijendra Singh					
Vijendra Singh					
Vijendra Singh					
Vijendra Singh Kapil					

Screen: Click on the desired customer card



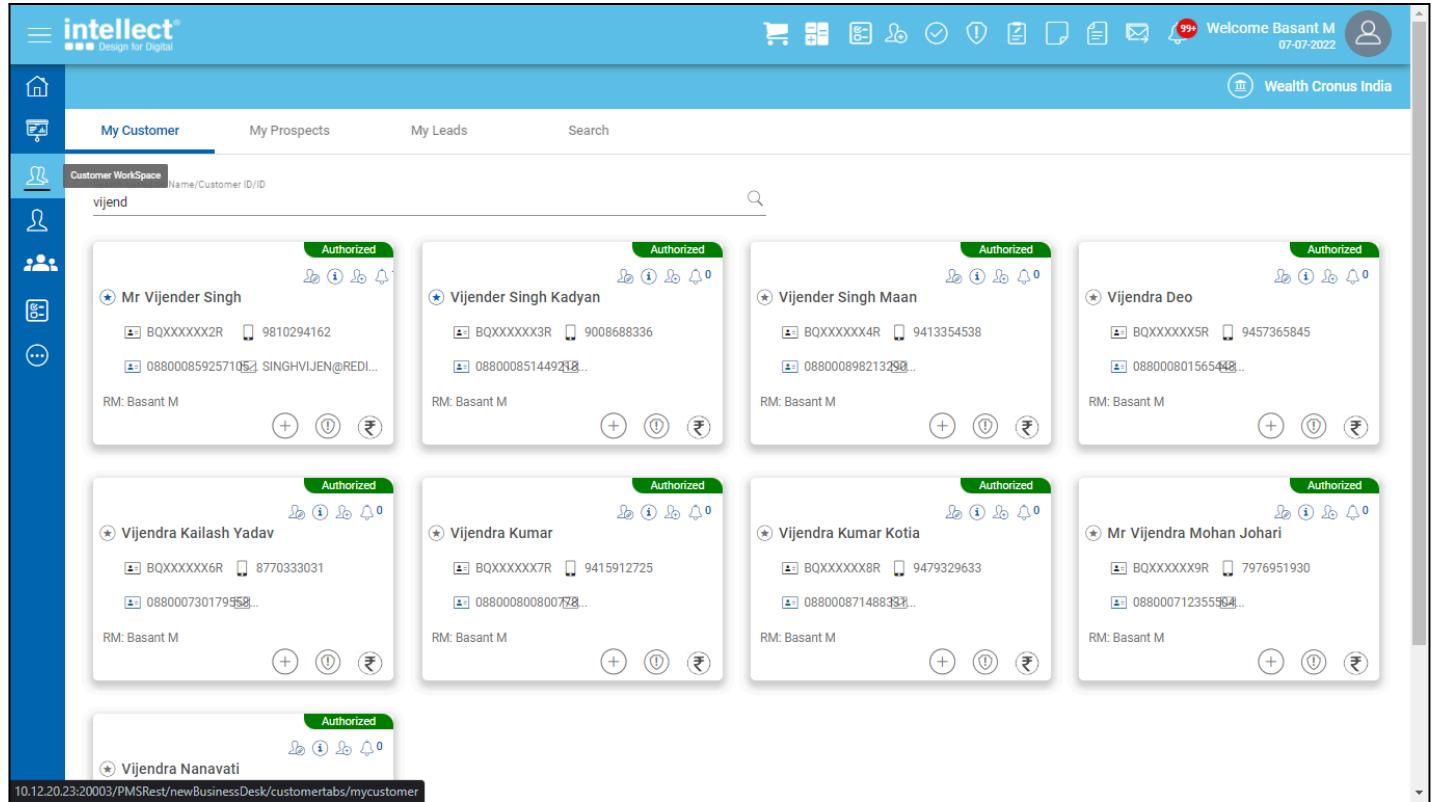
The screenshot shows the intellect My Space dashboard. On the left, there's a sidebar with icons for Home, Broadcast, Market Outlook, Customer WorkSpace, and more. The main area has tabs for Broadcast and Market Outlook. Under Broadcast, there are four cards: 'Annual Report' (09-06-2021), 'Top performing Funds' (09-06-2021), 'Best performing RM' (09-06-2021), and 'Broadcast Information for SBI Private Customer' (09-06-2021). To the right of these is a section for 'Alerts' with six items: Goal Achieved, High Salary Credit, Exceptional Case Alert, ReKYC Alert, Product Date Trigger Alert, Product Risk vs. Customer Risk, High Average Balance in Account, and RM Scheduled Meeting. Below these are two charts: 'Customer Summary' (bar chart) and 'Peer-to-Peer Benchmarking' (horizontal bar chart).

Category	Value
Total NTB Individual Customer	22
Total NTB Family Customer	4
Total ETB Individual Customer	12
Total ETB Family Customer	10
Total Customer to be mapped	38

Metric	Value
Total AUM	~220M
Wealth AUM	~220M
Customers with Wealth Products	~85
Revenue	~2,200k
Net New Money	~140M

Address bar: 10.12.20.23:20003/PMSRest/newBusinessDesk/customertabs/mycustomer

Screen: Click on Customer Workspace



Customer WorkSpace

Name/Customer ID/ID: vijend

My Customer My Prospects My Leads Search

Customer Cards:

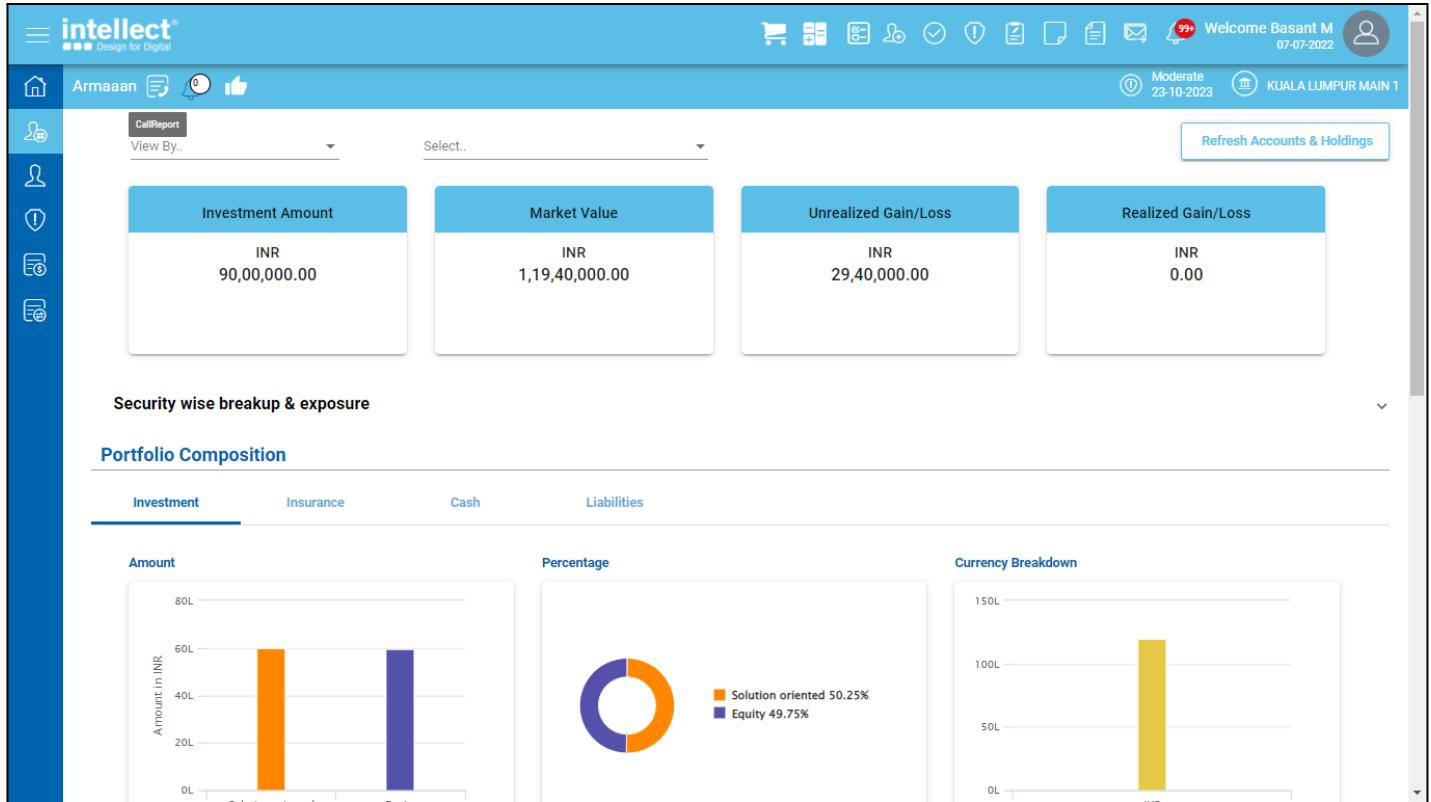
- Mr. Vijender Singh (Authorized)
- Vijender Singh Kadyan (Authorized)
- Vijender Singh Maan (Authorized)
- Vijendra Deo (Authorized)
- Vijendra Kailash Yadav (Authorized)
- Vijendra Kumar (Authorized)
- Vijendra Kumar Kotia (Authorized)
- Mr. Vijendra Mohan Johari (Authorized)
- Vijendra Nanavati (Authorized)

RM: Basant M

10.12.2023:20003/PMSRest/newBusinessDesk/customertabs/mycustomer

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



The screenshot shows a user interface for managing financial accounts. At the top, there's a navigation bar with icons for shopping cart, file, calendar, clock, profile, and other system functions. The top right corner displays a welcome message for 'Basant M' (07-07-2022), a moderation status ('Moderate 23-10-2023'), and the location 'KUALA LUMPUR MAIN 1'. On the left, a vertical sidebar contains icons for home, account, user, and other system functions. The main content area starts with a 'CallReport' section with dropdown menus for 'View By...' and 'Select..'. Below this are four boxes: 'Investment Amount' (INR 90,00,000.00), 'Market Value' (INR 1,19,40,000.00), 'Unrealized Gain/Loss' (INR 29,40,000.00), and 'Realized Gain/Loss' (INR 0.00). A button 'Refresh Accounts & Holdings' is located in the top right of this section. Below these boxes is a section titled 'Security wise breakup & exposure' which includes a 'Portfolio Composition' chart. The chart has tabs for 'Investment' (selected), 'Insurance', 'Cash', and 'Liabilities'. Under 'Investment', there are three charts: 'Amount' (bar chart showing two bars, one orange and one blue), 'Percentage' (donut chart showing two segments, one orange and one blue), and 'Currency Breakdown' (bar chart showing one yellow bar). The 'Amount' chart has a y-axis from 0L to 80L. The 'Percentage' chart indicates 'Solution oriented 50.25%' (orange) and 'Equity 49.75%' (blue). The 'Currency Breakdown' chart has a y-axis from 0L to 150L.

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)

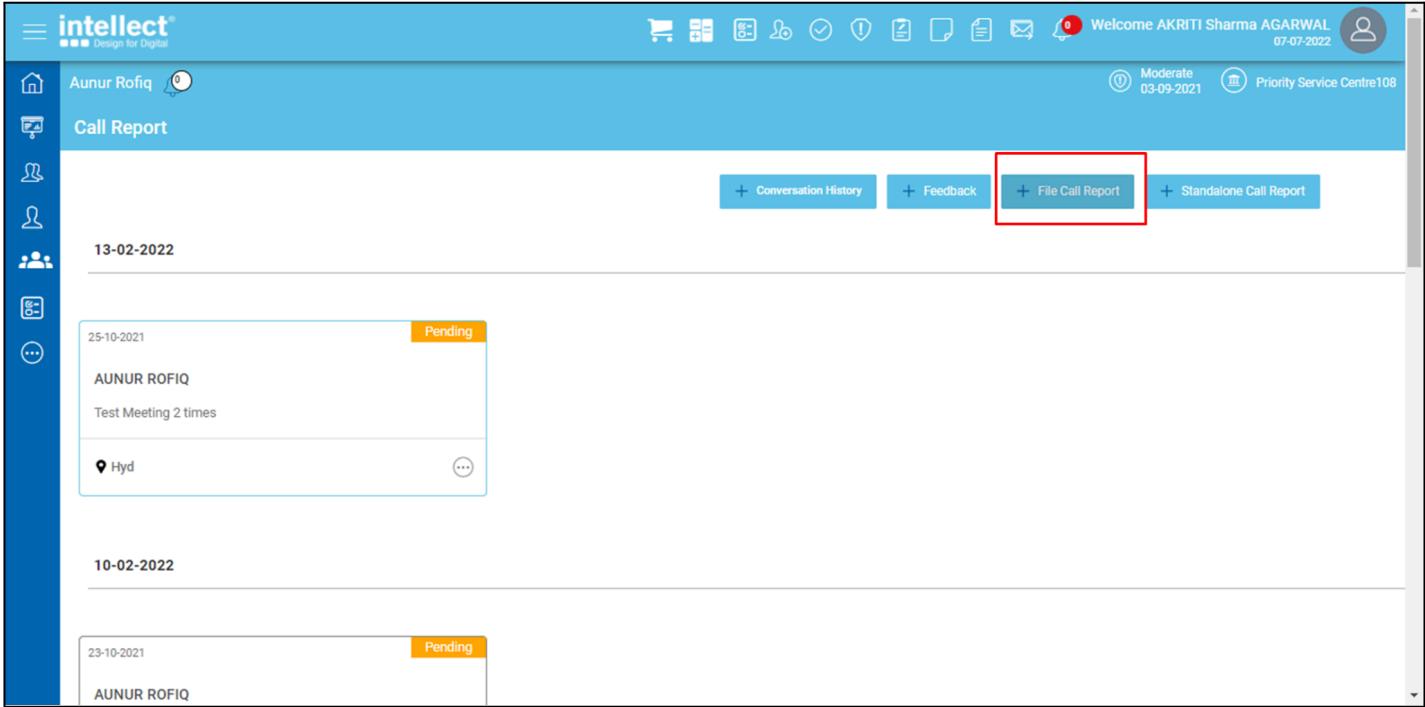
The screenshot shows the intellect Design for Digital platform's interface. At the top, there is a navigation bar with icons for Home, Recent, Chat, Task, Profile, and Help. The user is logged in as Vijendra Sharma, with a notification count of 0. The current page is 'Call Report'. On the left, there is a vertical sidebar with icons for Home, Recent, Chat, Task, Profile, and Help. In the center, there are four buttons: '+ Conversation History', '+ Feedback', '+ File Call Report' (which is highlighted with a red box), and '+ Standalone Call Report'. A 'Back' button is located at the bottom left of the main content area.

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

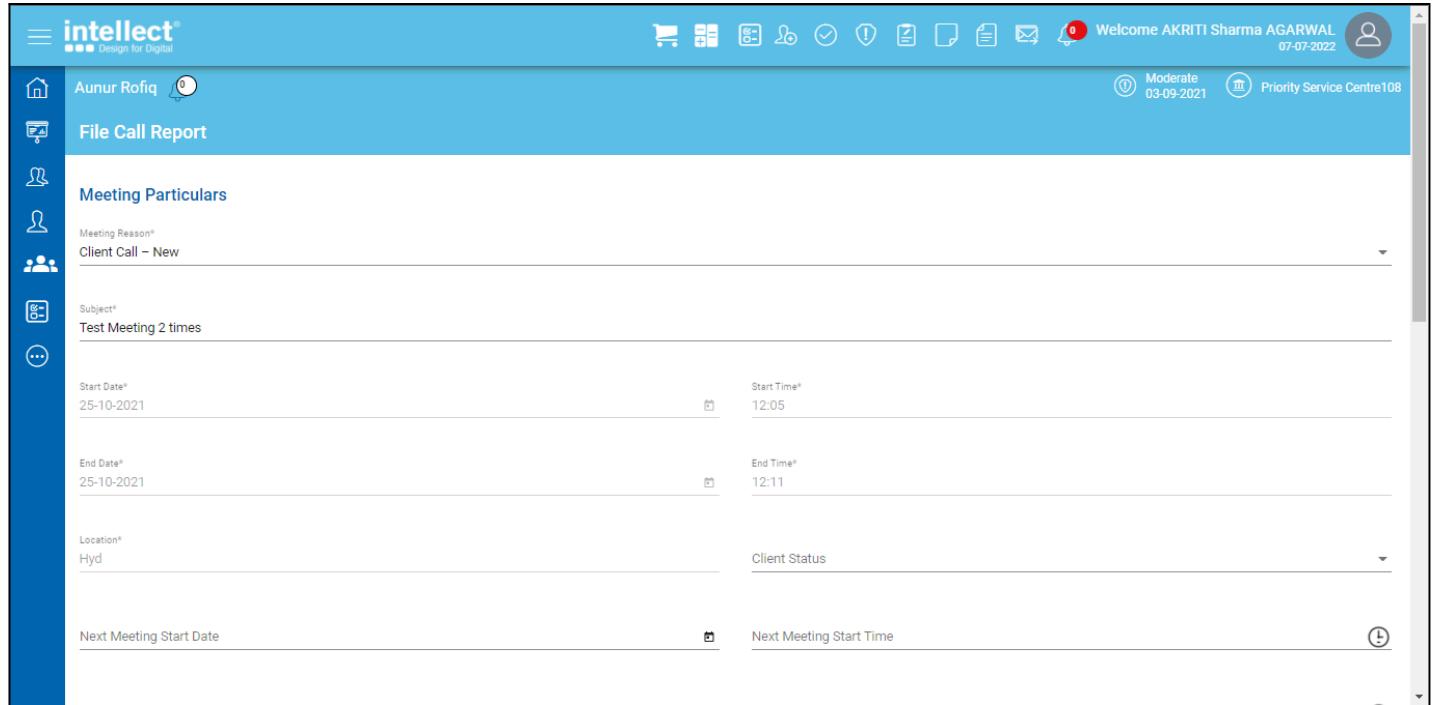
- On the Call Report screen, the User selects a record with status “Pending” to file a call report (by clicking on the meeting card) and then clicking on the “File Call Report” button to navigate to the File Call Report screen



The screenshot shows the Intellect software interface with a blue header bar. On the left, there's a vertical sidebar with icons for Home, Call Log, Contacts, and Groups. The main area is titled "Call Report". At the top right, it says "Welcome AKRITI Sharma AGARWAL 07-07-2022" and shows "Moderate 03-09-2021" and "Priority Service Centre108". Below this, there are four buttons: "+ Conversation History", "+ Feedback", "+ File Call Report" (which is highlighted with a red box), and "+ Standalone Call Report". Underneath these buttons, there are two sections of meeting records. The first section is for "13-02-2022" and the second for "10-02-2022". Each section contains a card with details: date (25-10-2021 or 23-10-2021), name (AUNUR ROFIQ), status (Pending), location (Hyd), and a three-dot ellipsis icon.

Screen: Select Pending Meeting and click on File Call Report

- 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



Aunur Rofiq

File Call Report

Meeting Particulars

Meeting Reason*
Client Call - New

Subject*
Test Meeting 2 times

Start Date*
25-10-2021

End Date*
25-10-2021

Location*
Hyd

Start Time*
12:05

End Time*
12:11

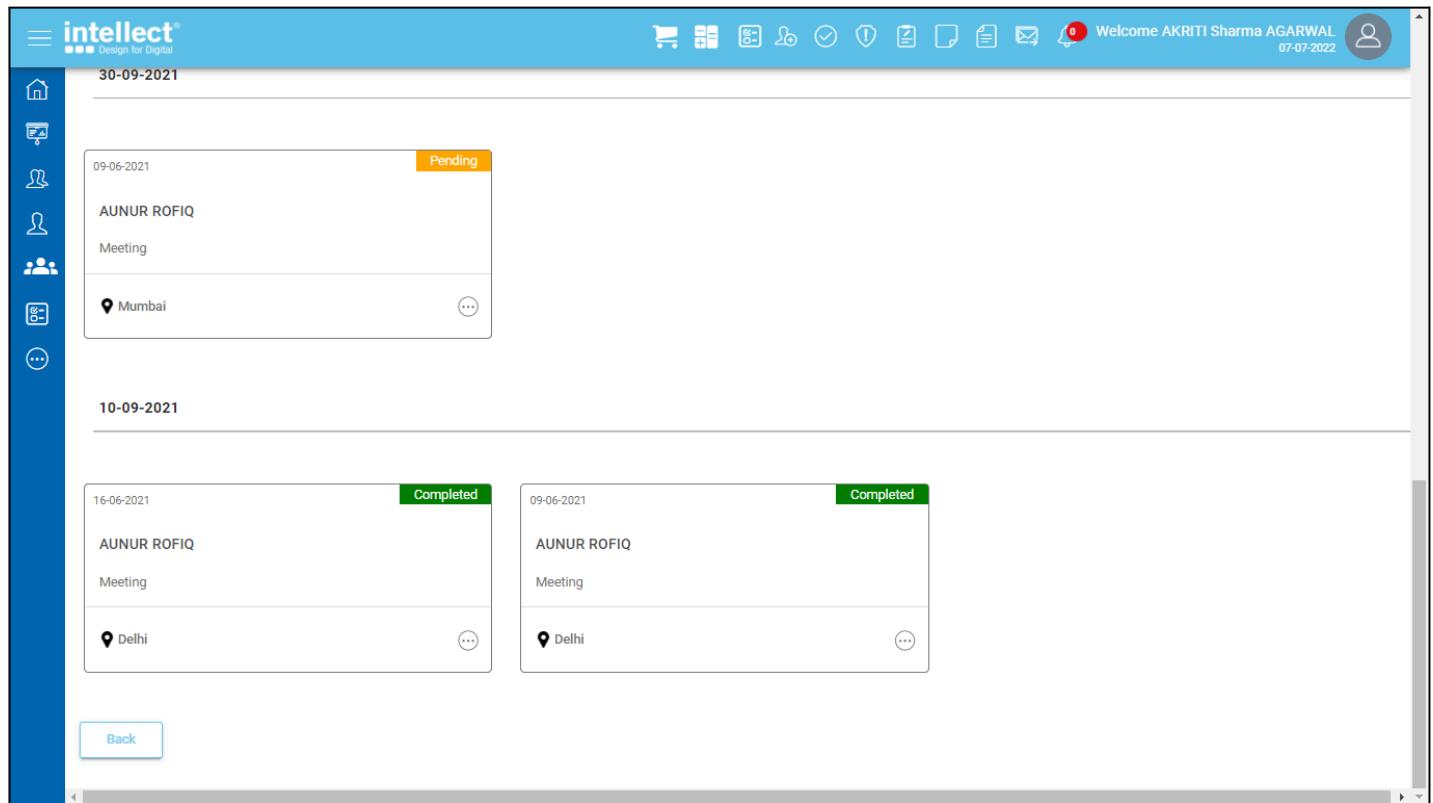
Client Status

Next Meeting Start Date

Next Meeting Start Time

Screen: Click on Save

- The call report is now successfully filed, and the User can see that the meeting status on the meeting card is updated to "Completed"



30-09-2021

09-06-2021 Pending

AUNUR ROFIQ

Meeting

Mumbai

10-09-2021

16-06-2021 Completed

AUNUR ROFIQ

Meeting

Delhi

09-06-2021 Completed

AUNUR ROFIQ

Meeting

Delhi

Back

Screen: Call Report successfully filed and meeting status updated

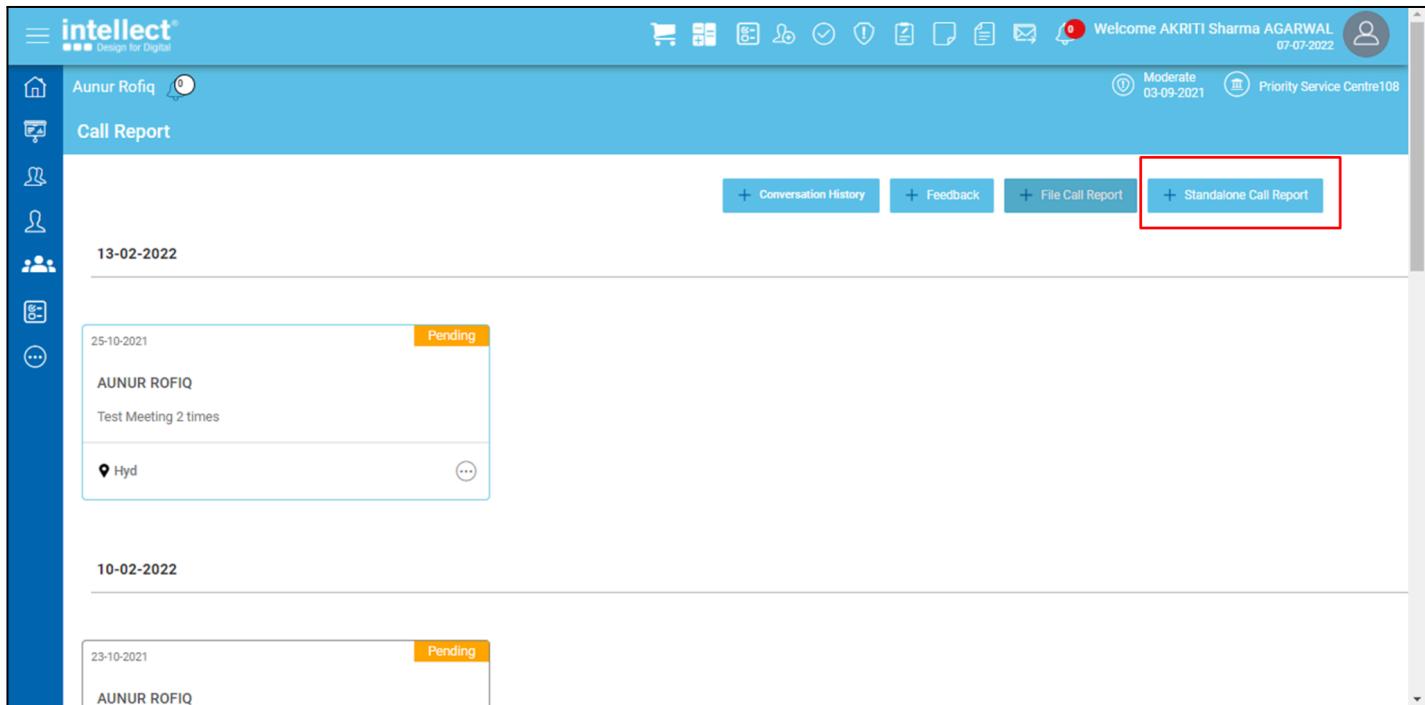
4.3.3. Standalone Call Report

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

- Customer Dashboard > Call Report Screen
- Calendar Screen

4.3.3.1. Standalone Call Report (From Customer Dashboard)

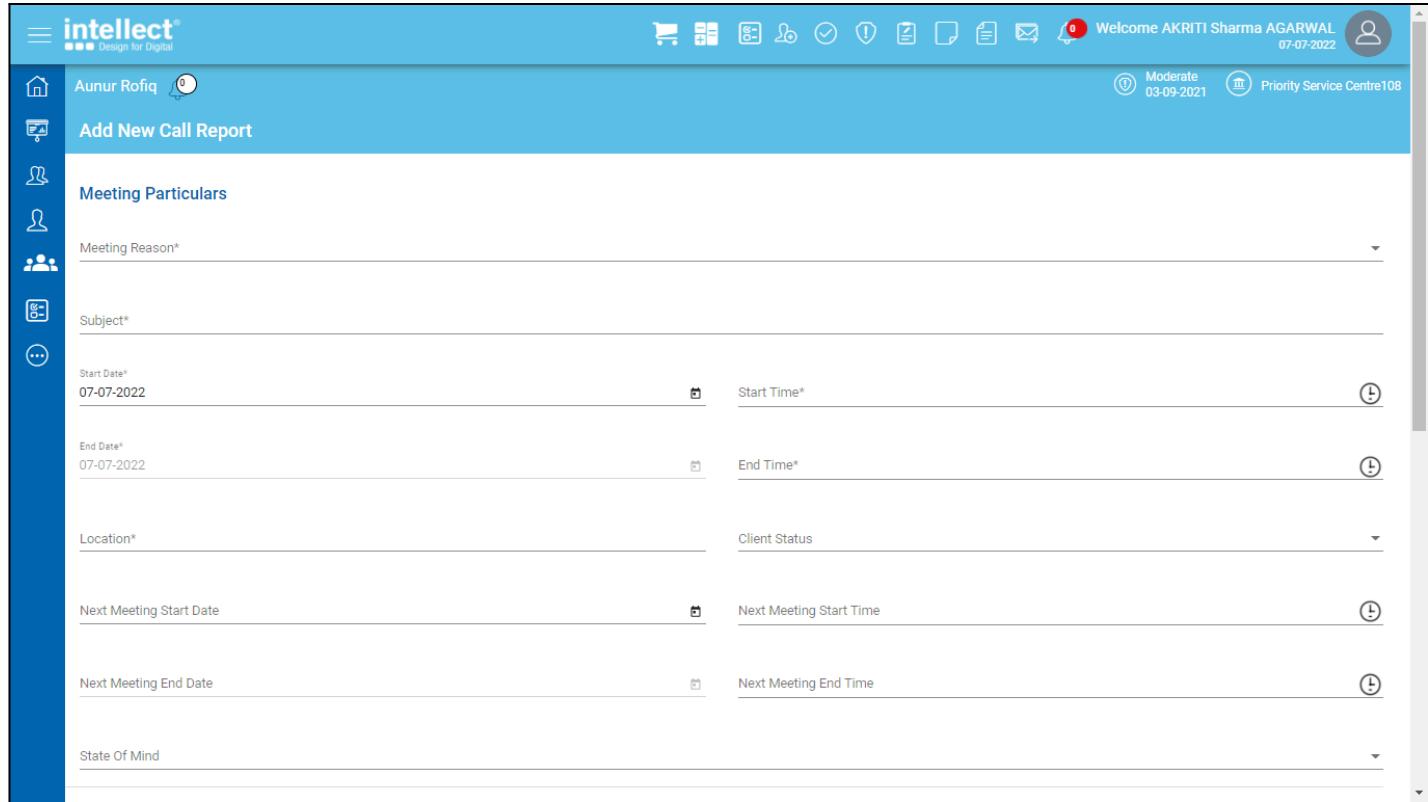
- On the Call Report screen, the User clicks on the “Standalone Call Report” button to navigate to the Add New Call Report screen



The screenshot shows the Intellect Customer Dashboard interface. The top navigation bar includes icons for shopping cart, calendar, user profile, and other system functions. The top right corner displays a welcome message for 'AKRITI Sharma AGARWAL' with the date '07-07-2022'. Below the header, the main menu has 'Call Report' selected. On the left, there's a vertical sidebar with icons for Home, Profile, Call Report, and other services. The main content area shows a list of meetings. The first meeting listed is for 'AUNUR ROFIQ' on '25-10-2021' at 'Hyd', with a status of 'Pending'. The second meeting listed is for 'AUNUR ROFIQ' on '10-02-2022'. At the bottom right of the main content area, there are four buttons: '+ Conversation History', '+ Feedback', '+ File Call Report', and '+ Standalone Call Report'. The '+ Standalone Call Report' button is highlighted with a red rectangular box.

Screen: Click on Standalone Call Report

- 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



Meeting Particulars

Meeting Reason*

Subject*

Start Date*
07-07-2022

End Date*
07-07-2022

Location*

Client Status

Next Meeting Start Date

Next Meeting Start Time

Next Meeting End Date

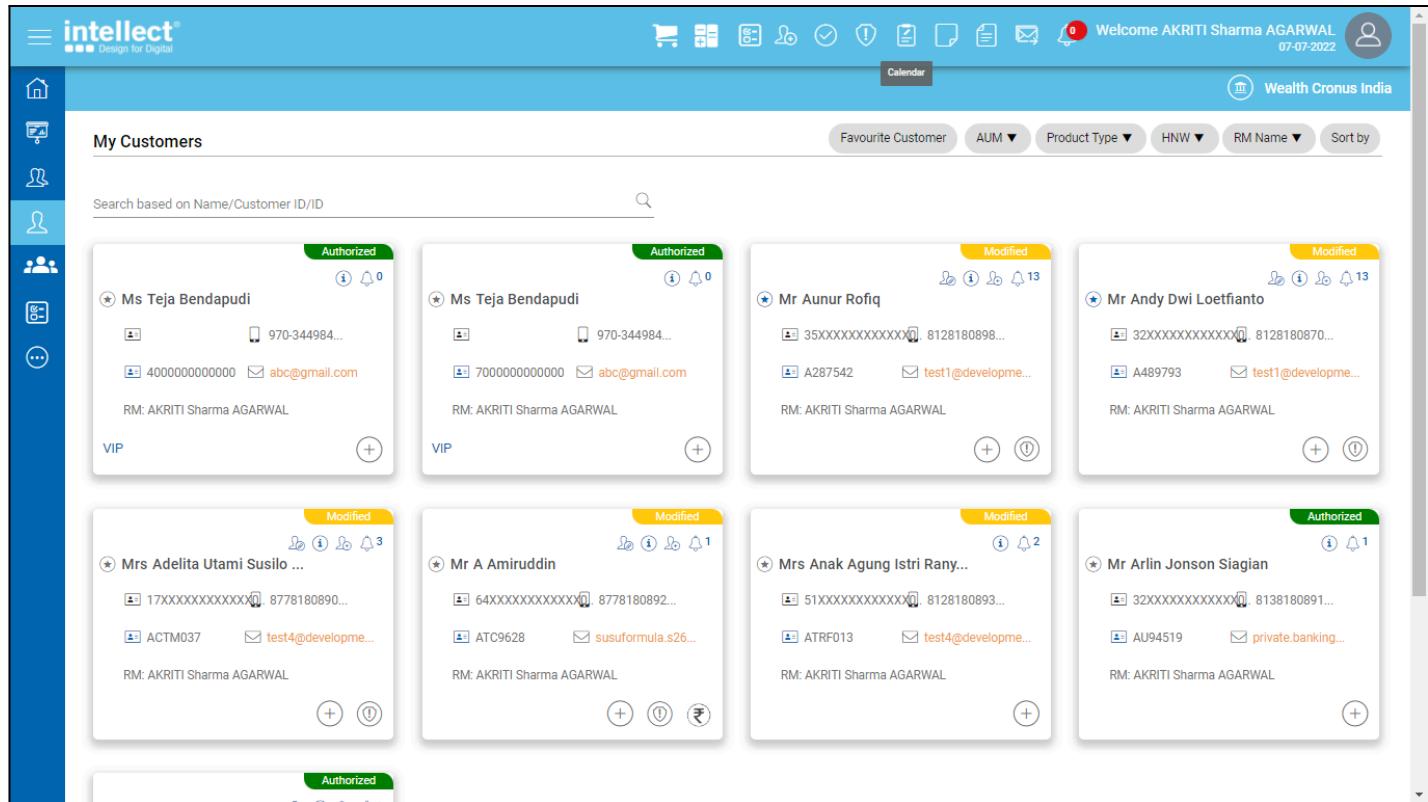
Next Meeting End Time

State Of Mind

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



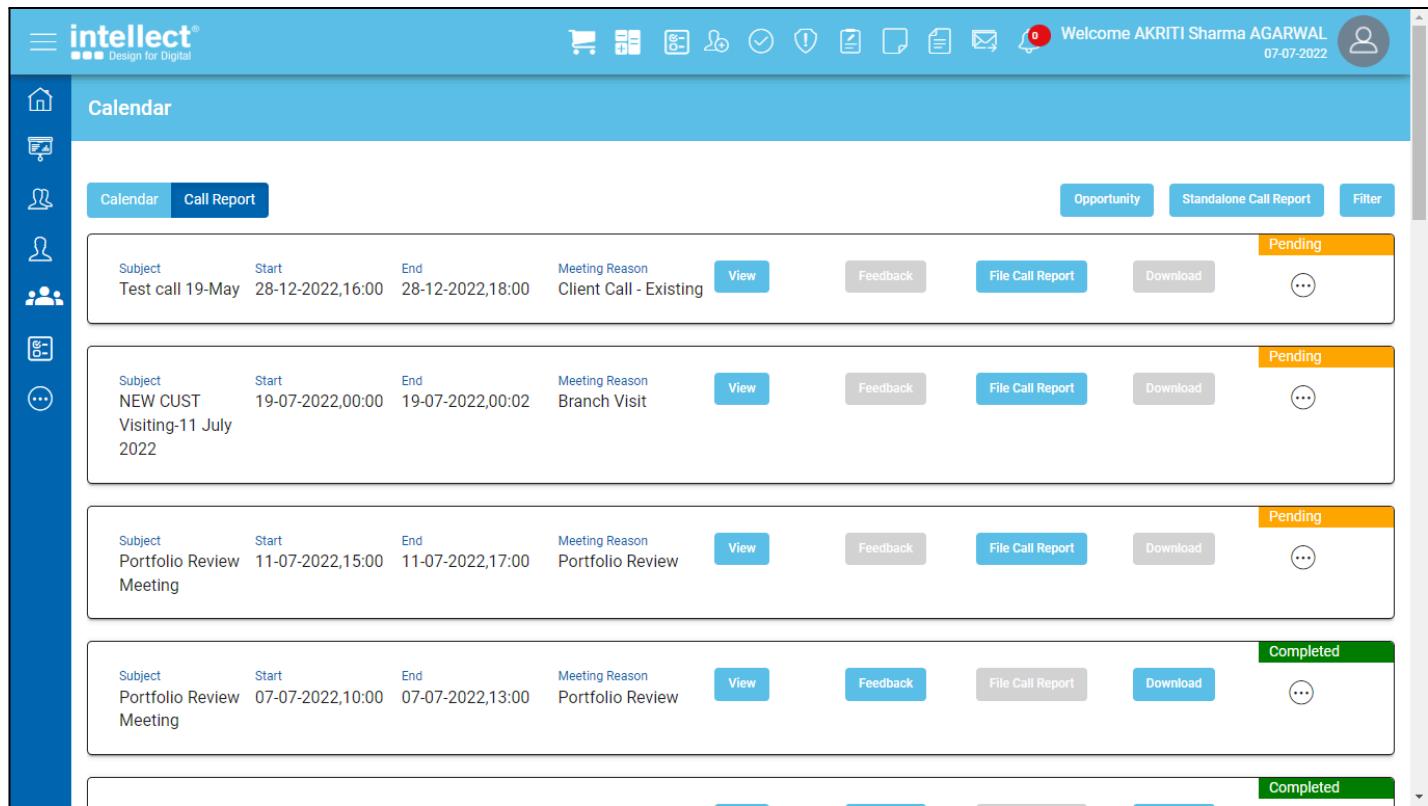
My Customers

Search based on Name/Customer ID/ID

Category	Name	Contact	Role	Actions
Authorized	Ms Teja Bendapudi	970-344984..., abc@gmail.com	RM: AKRITI Sharma AGARWAL	[+]
Authorized	Ms Teja Bendapudi	970-344984..., abc@gmail.com	RM: AKRITI Sharma AGARWAL	[+]
Modified	Mr Aunur Rofiq	35XXXXXXXXXXXX, 8128180898...	RM: AKRITI Sharma AGARWAL	[+]
Modified	Mr Andy Dwi Loefianto	32XXXXXXXXXXXX, 8128180870...	RM: AKRITI Sharma AGARWAL	[+]
Modified	Mrs Adelita Utami Susilo ...	17XXXXXXXXXX, 8778180890...	RM: AKRITI Sharma AGARWAL	[+]
Modified	Mr A Amiruddin	64XXXXXXXXXXXX, 8778180892...	RM: AKRITI Sharma AGARWAL	[+]
Modified	Mrs Anak Agung Istri Rany...	51XXXXXXXXXXXX, 8128180893...	RM: AKRITI Sharma AGARWAL	[+]
Authorized	Mr Arlin Jonson Siagian	32XXXXXXXXXXXX, 8138180891...	RM: AKRITI Sharma AGARWAL	[+]

Screen: Click on Calendar

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

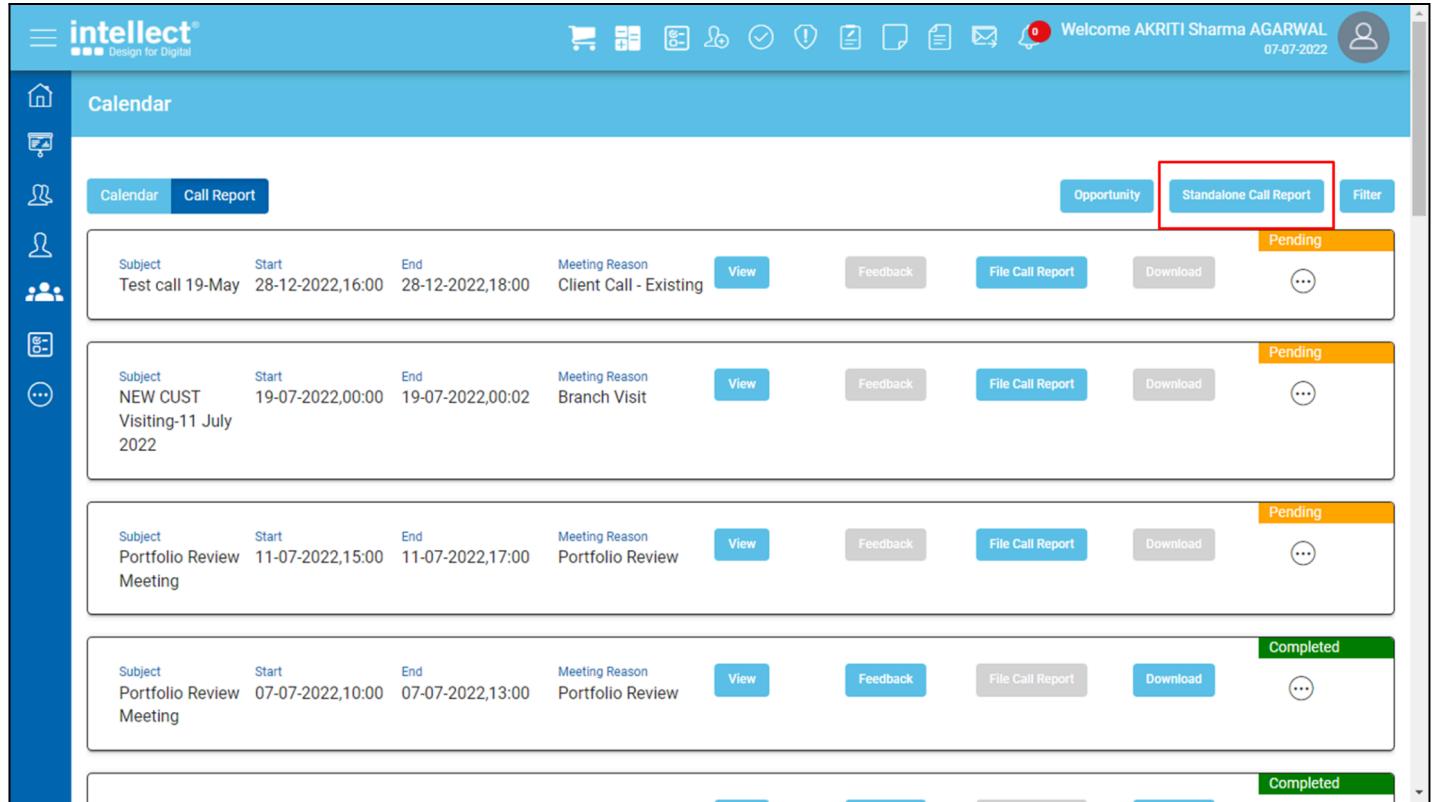


The screenshot shows a software interface for managing meetings. On the left is a vertical sidebar with icons for Home, Calendar, Tasks, Contacts, and Help. The main area is titled 'Calendar' and contains a list of call reports. Each report is presented in a card format with the following fields:

- Subject:** Test call 19-May / NEW CUST Visiting-11 July 2022
- Start:** 28-12-2022,16:00 / 19-07-2022,00:00
- End:** 28-12-2022,18:00 / 19-07-2022,00:02
- Meeting Reason:** Client Call - Existing / Branch Visit
- Status:** Pending (for the first three) and Completed (for the last one)
- Actions:** View, Feedback, File Call Report, Download, and a more options button.

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

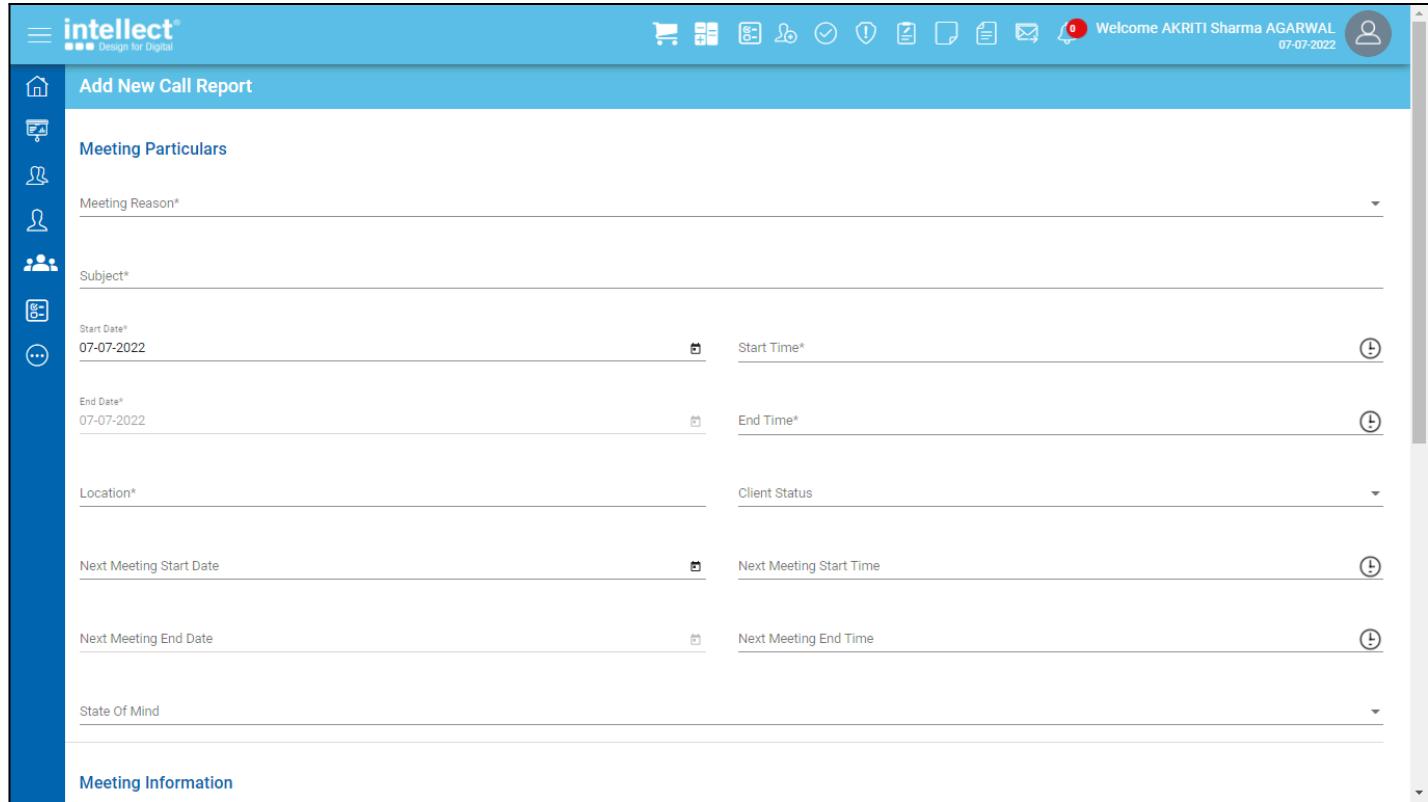


The screenshot shows a software interface for managing meetings. On the left is a vertical sidebar with icons for Home, File, User, and Help. The main header bar includes a logo, user information (Welcome AKRITI Sharma AGARWAL, 07-07-2022), and a search bar. Below the header, a navigation bar has 'Calendar' and 'Call Report' tabs, with 'Call Report' being active. A toolbar above the list of meetings includes 'Opportunity', 'Standalone Call Report' (which is highlighted with a red box), and 'Filter'. The list of meetings is presented in a grid format:

Subject	Start	End	Meeting Reason	Action Buttons	Status
Test call 19-May	28-12-2022,16:00	28-12-2022,18:00	Client Call - Existing	View Feedback File Call Report Download ...	Pending
NEW CUST Visiting-11 July 2022	19-07-2022,00:00	19-07-2022,00:02	Branch Visit	View Feedback File Call Report Download ...	Pending
Portfolio Review Meeting	11-07-2022,15:00	11-07-2022,17:00	Portfolio Review	View Feedback File Call Report Download ...	Pending
Portfolio Review Meeting	07-07-2022,10:00	07-07-2022,13:00	Portfolio Review	View Feedback File Call Report Download ...	Completed
					Completed

Screen: Click on Standalone Call Report

- 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



Add New Call Report

Meeting Particulars

Meeting Reason*

Subject*

Start Date*
07-07-2022

End Date*
07-07-2022

Location*

Client Status

Next Meeting Start Date

Next Meeting Start Time

Next Meeting End Date

Next Meeting End Time

State Of Mind

Meeting Information

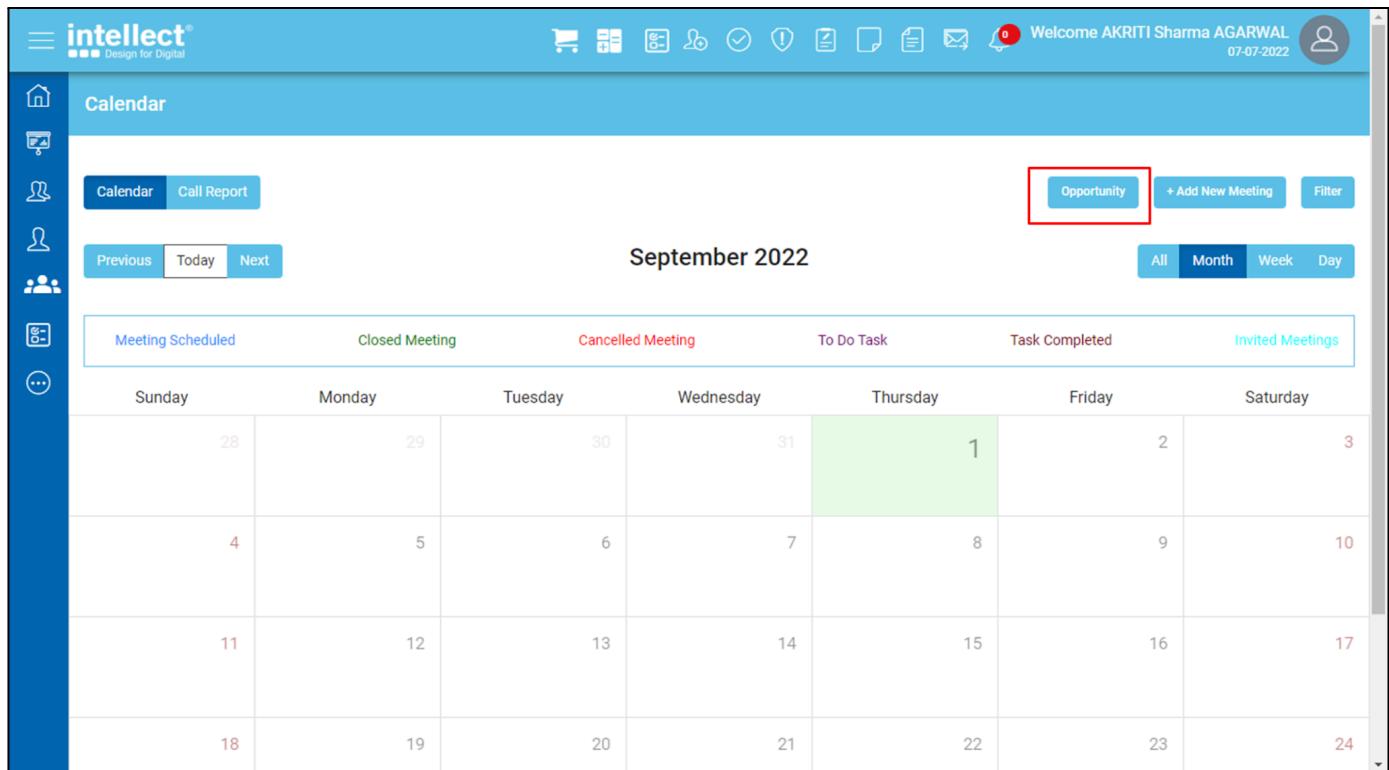
Screen: File Standalone Call Report

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

- The user will click on the Opportunity Tab from the calendar tab



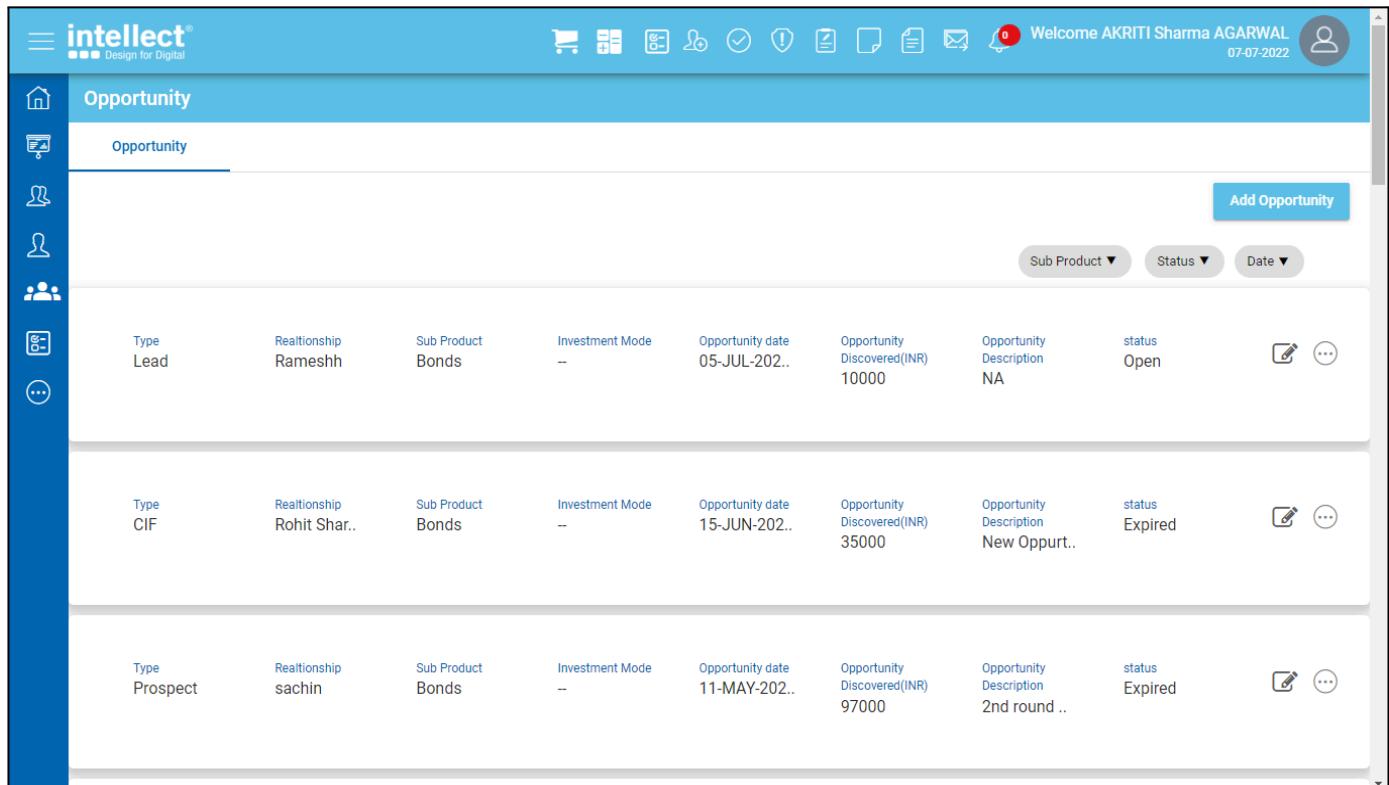
Calendar

September 2022

Meeting Scheduled	Closed Meeting	Cancelled Meeting	To Do Task	Task Completed	Invited Meetings
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday
28	29	30	31	1	2
4	5	6	7	8	9
11	12	13	14	15	16
18	19	20	21	22	23
					24

Screen: Opportunity Capture navigation from Calendar screen

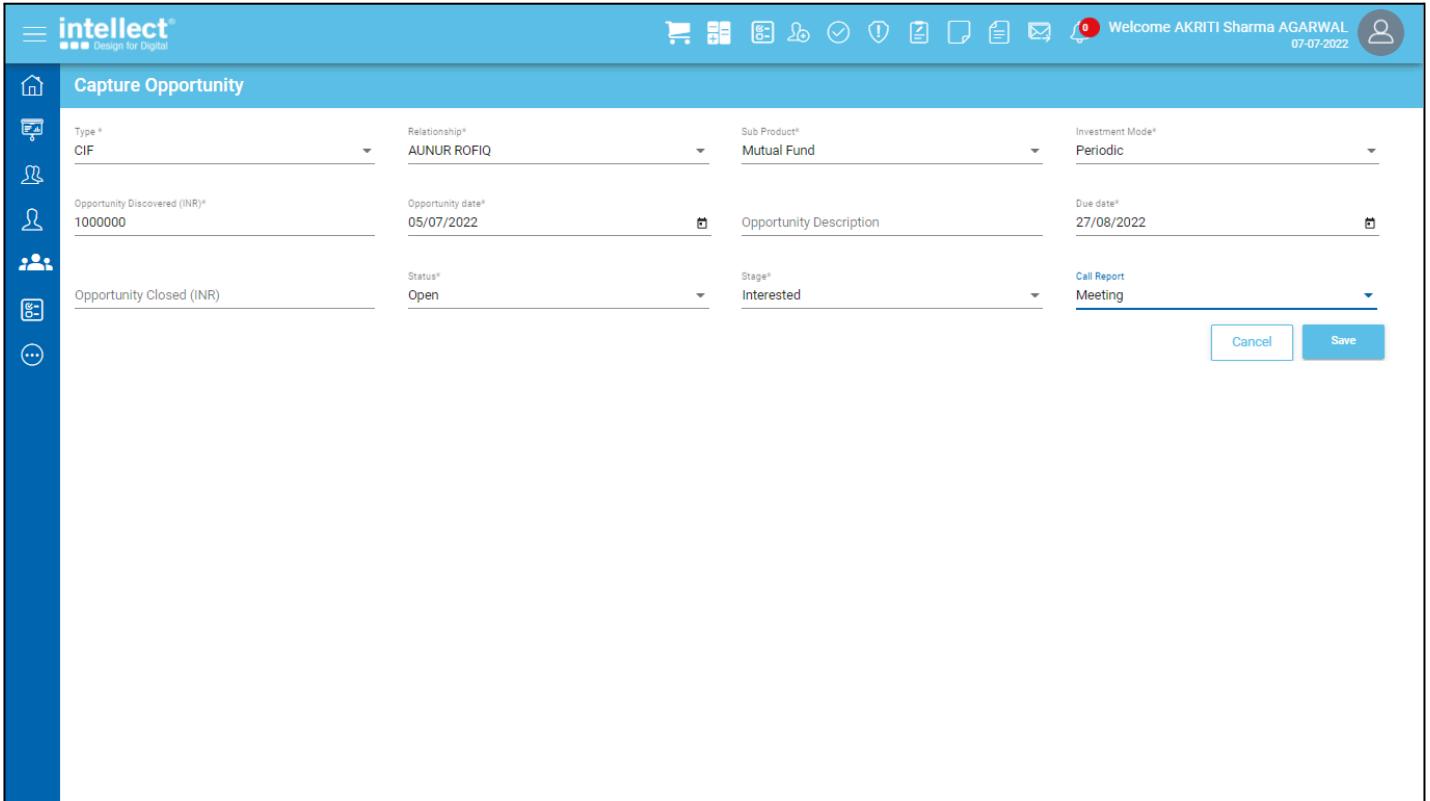
- User will click on “Add Opportunity” Tab



Type	Relationship	Sub Product	Investment Mode	Opportunity date	Opportunity Discovered(INR)	Opportunity Description	Status
Lead	Rameshh	Bonds	--	05-JUL-202..	10000	NA	Open
CIF	Rohit Shar..	Bonds	--	15-JUN-202..	35000	New Oppurt..	Expired
Prospect	sachin	Bonds	--	11-MAY-202..	97000	2nd round ..	Expired

Screen: Opportunity Capture

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



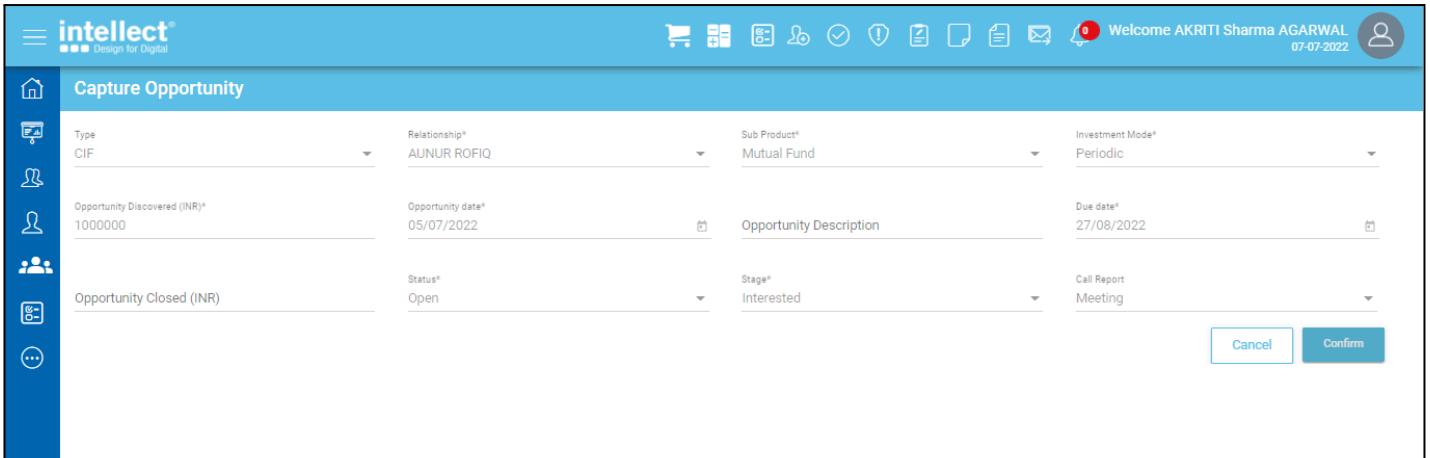
This screenshot shows the 'Capture Opportunity' form. The mandatory fields are filled as follows:

- Type*: CIF
- Relationship*: AUNUR ROFIQ
- Sub Product*: Mutual Fund
- Investment Mode*: Periodic
- Opportunity Discovered (INR)*: 1000000
- Opportunity date*: 05/07/2022
- Opportunity Description: (empty)
- Due date*: 27/08/2022
- Opportunity Closed (INR): (empty)
- Status*: Open
- Stage*: Interested
- Call Report: Meeting

The 'Save' button is highlighted in blue at the bottom right.

Screen: Add an Opportunity

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

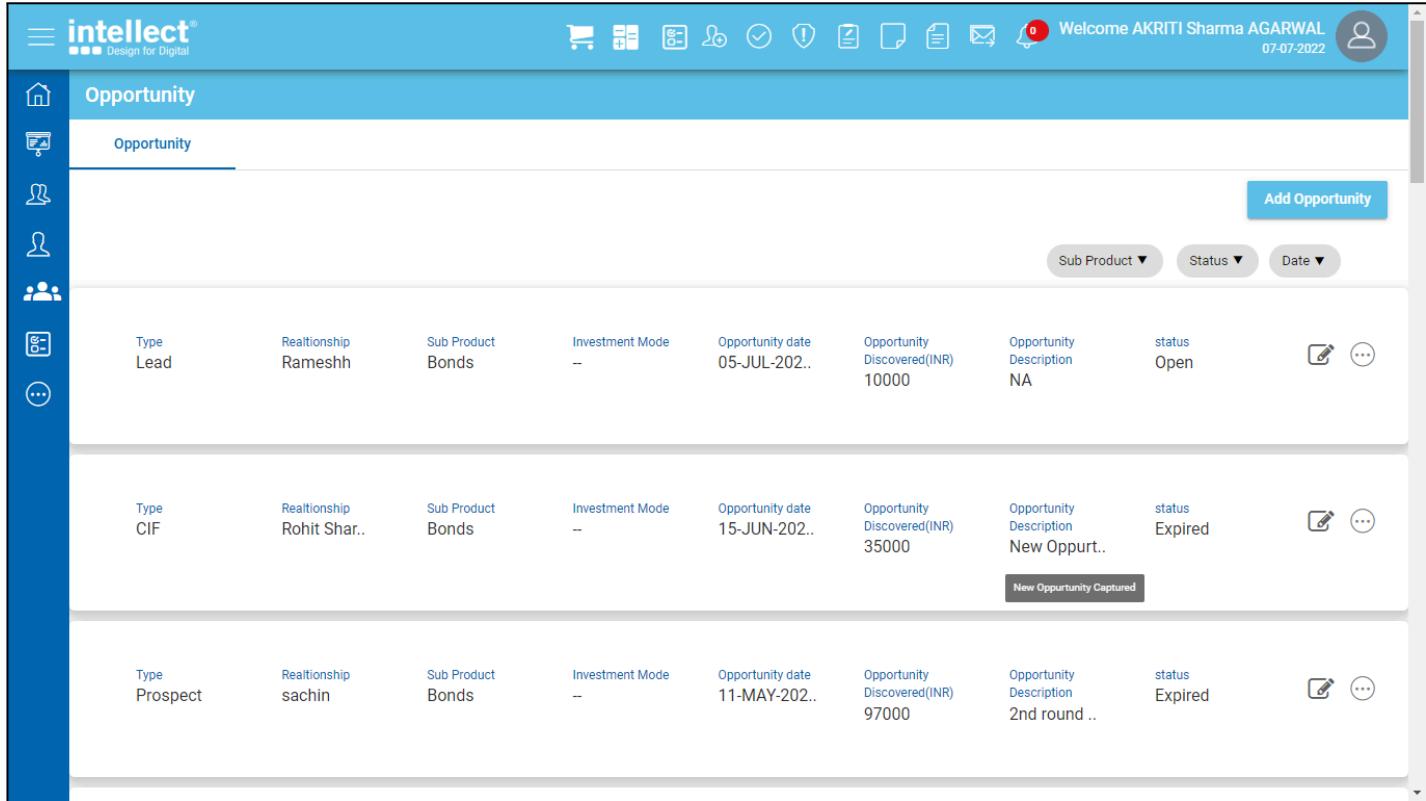


This screenshot shows the same 'Capture Opportunity' form as above, but the 'Confirm' button is highlighted in blue at the bottom right.

Screen: Save and Confirm an Opportunity

1.4.2 View an Opportunity

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

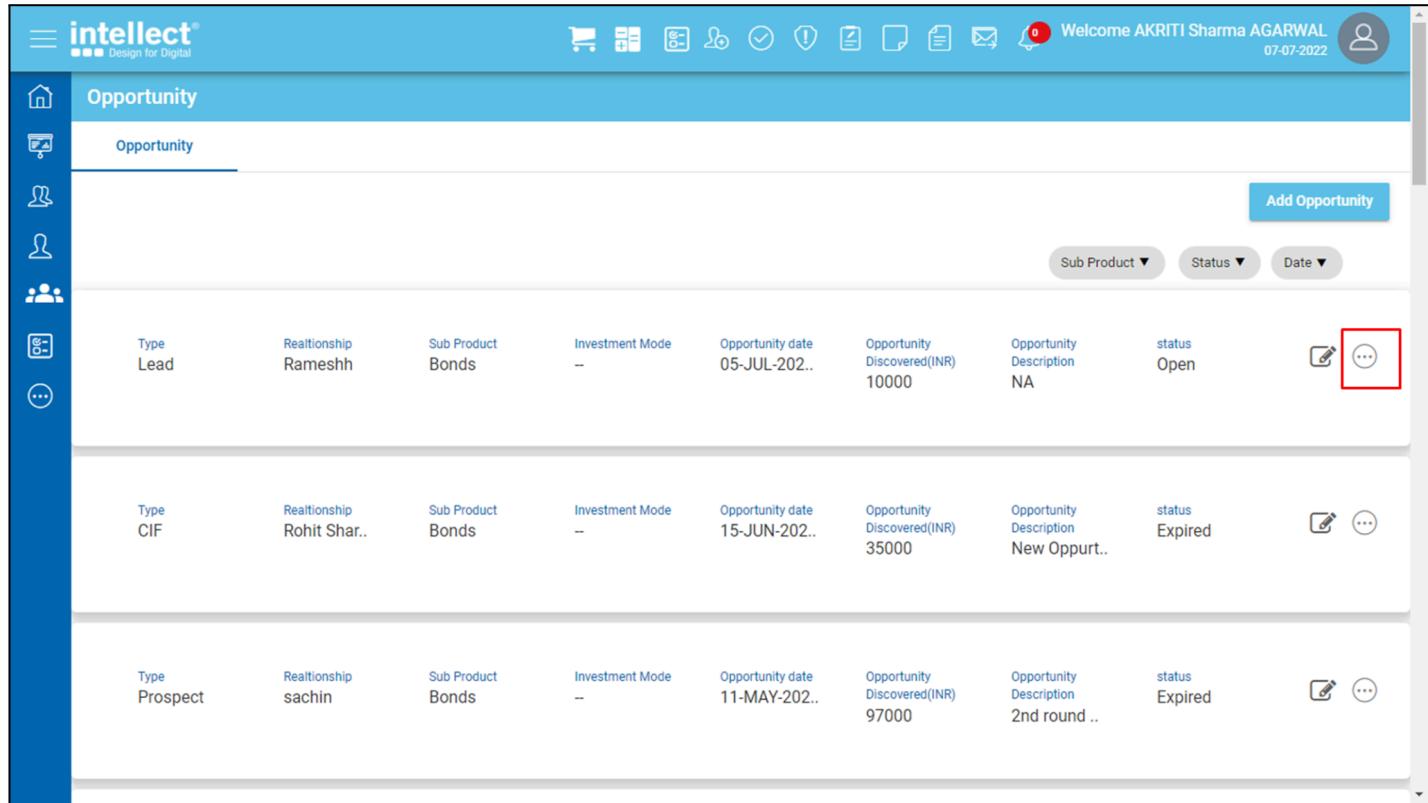


The screenshot shows the Intellect application interface for viewing opportunities. The top navigation bar includes the Intellect logo, a search bar, and various icons for navigation and communication. The main header is "Opportunity". On the left, there is a vertical sidebar with icons for Home, Opportunity, Relationship, Sub Product, Investment Mode, Opportunity date, Opportunity Discovered(INR), Opportunity Description, Status, and Date. The main content area displays three rows of opportunity data:

Type	Relationship	Sub Product	Investment Mode	Opportunity date	Opportunity Discovered(INR)	Opportunity Description	Status	Action
Lead	Ramesh	Bonds	-	05-JUL-202..	10000	NA	Open	
CIF	Rohit Shar..	Bonds	-	15-JUN-202..	35000	New Oppurt..	Expired	 New Oppurtunity Captured
Prospect	sachin	Bonds	-	11-MAY-202..	97000	2nd round ..	Expired	

Screen: List of Opportunities Captured

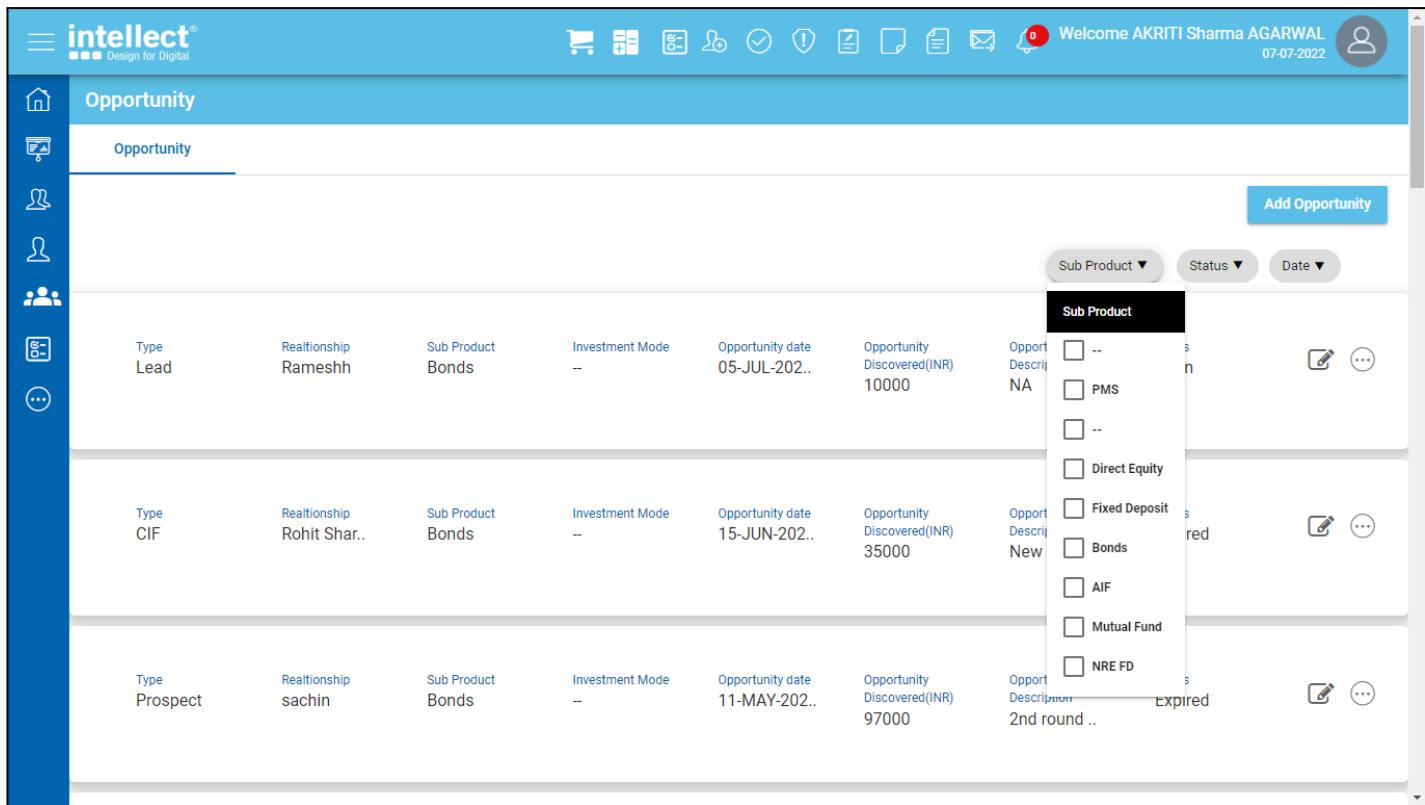
2. To view the existing opportunity, User will click on  button and the expanded view of the opportunity captured will be displayed



Type	Relationship	Sub Product	Investment Mode	Opportunity date	Opportunity Discovered(INR)	Opportunity Description	Status	Action
Lead	Ramesh Ramesh	Bonds	-	05-JUL-202..	10000	NA	Open	 
CIF	Rohit Shar..	Bonds	-	15-JUN-202..	35000	New Oppurt..	Expired	 
Prospect	sachin	Bonds	-	11-MAY-202..	97000	2nd round ..	Expired	 

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)

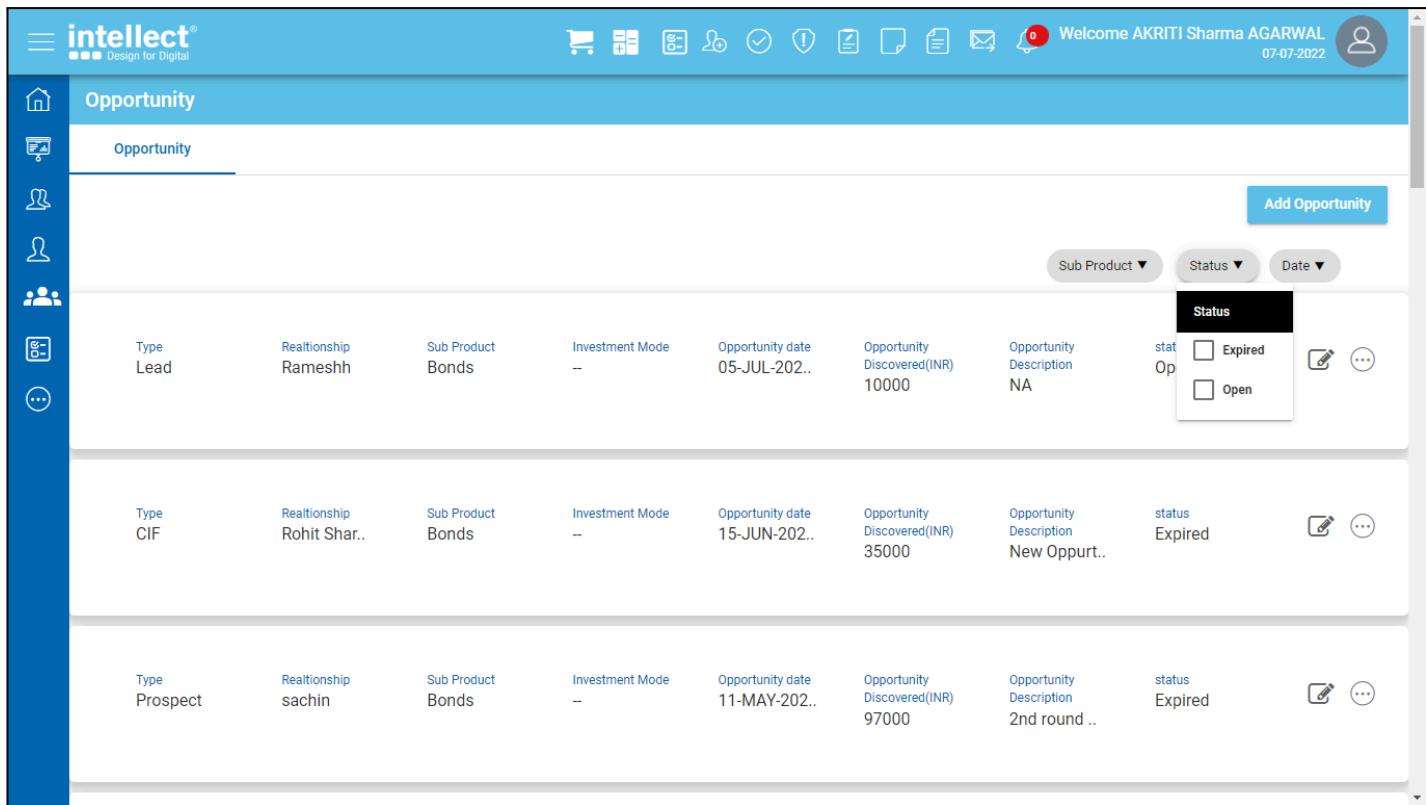


The screenshot shows the intellect software interface with the following details:

- Header:** Welcome AKRITI Sharma AGARWAL, 07-07-2022.
- Left Sidebar:** Icons for Home, Opportunity, Relationship, Lead, Contact, and more.
- Opportunity List:**
 - Type: Lead, Relationship: Ramesh, Sub Product: Bonds, Investment Mode: -, Opportunity date: 05-JUL-202.., Opportunity Discovered(INR): 10000, Opportunity Description: NA.
 - Type: CIF, Relationship: Rohit Shar., Sub Product: Bonds, Investment Mode: -, Opportunity date: 15-JUN-202.., Opportunity Discovered(INR): 35000, Opportunity Description: New.
 - Type: Prospect, Relationship: sachin, Sub Product: Bonds, Investment Mode: -, Opportunity date: 11-MAY-202.., Opportunity Discovered(INR): 97000, Opportunity Description: 2nd round ..
- Filter Modal:** A dropdown menu titled "Sub Product" listing various options:
 -
 - PMS
 -
 - Direct Equity
 - Fixed Deposit
 - Bonds
 - AIF
 - Mutual Fund
 - NRE FD

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)

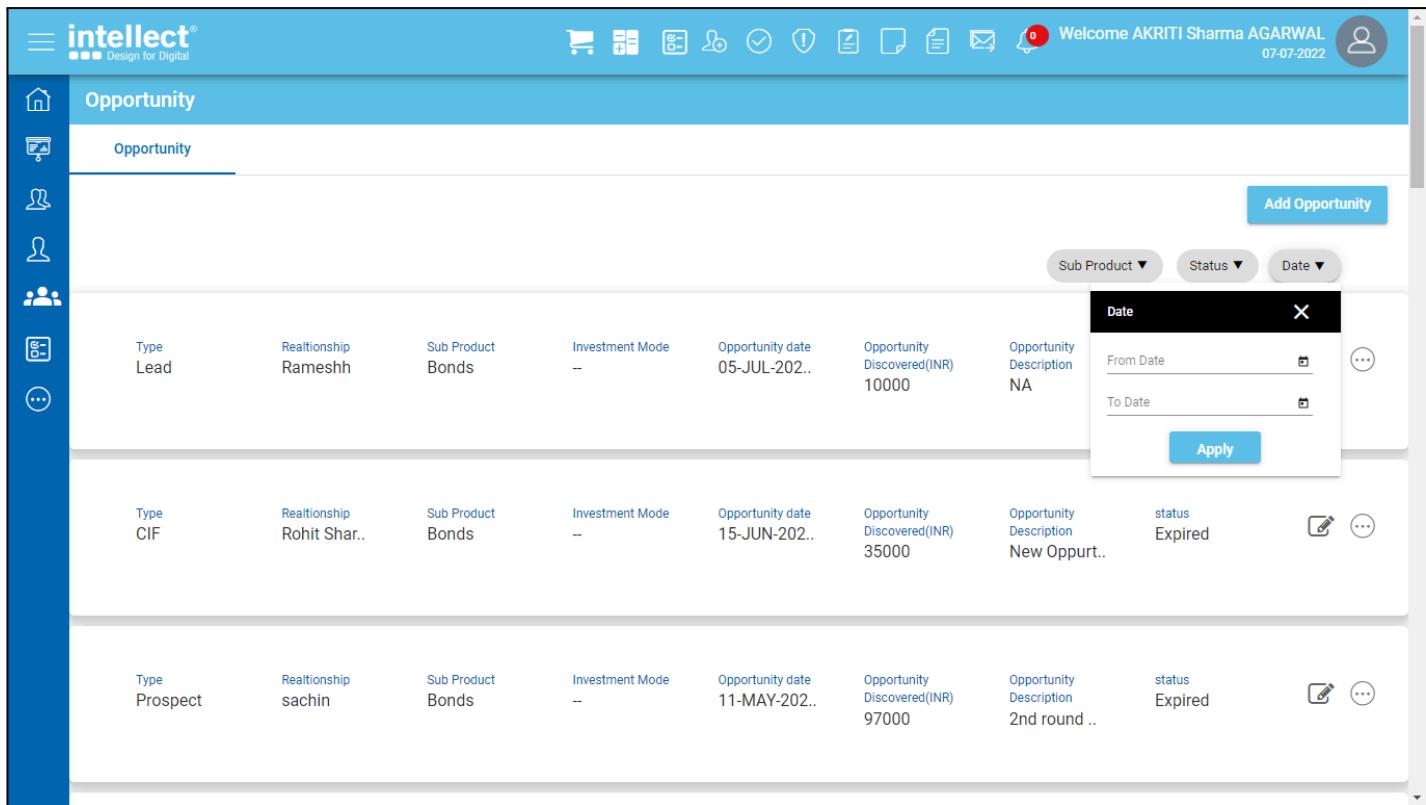


The screenshot shows the Intellect application interface for managing opportunities. The top navigation bar includes icons for shopping cart, calendar, user profile, and various document types, along with a welcome message for 'AKRITI Sharma AGARWAL' dated '07-07-2022'. On the left, a vertical sidebar contains icons for home, reports, users, and groups. The main header 'Opportunity' is selected, and the sub-header 'Opportunity' is shown. A blue button 'Add Opportunity' is visible. Below the header, there are three rows of opportunity data, each with edit and delete icons. A dropdown menu labeled 'Status' is open over the third row, showing two options: 'Expired' (unchecked) and 'Open' (unchecked). The data rows are as follows:

Type	Relationship	Sub Product	Investment Mode	Opportunity date	Opportunity Discovered(INR)	Opportunity Description	Status
Lead	Ramesh Ramesh	Bonds	-	05-JUL-202..	10000	NA	<input type="checkbox"/> Expired <input type="checkbox"/> Open
CIF	Rohit Shar..	Bonds	-	15-JUN-202..	35000	New Oppurt..	status Expired
Prospect	sachin	Bonds	-	11-MAY-202..	97000	2nd round ..	<input type="checkbox"/> Expired <input type="checkbox"/> Open

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



The screenshot shows the intellect software interface with the following details:

- Header:** Welcome AKRITI Sharma AGARWAL, 07-07-2022.
- Left Sidebar:** Icons for Home, Opportunity, Relationship, Sub Product, Investment Mode, Opportunity Date, Opportunity Discovered, Opportunity Description, Status, and Date.
- Opportunity List:**

Type	Relationship	Sub Product	Investment Mode	Opportunity date	Opportunity Discovered(INR)	Opportunity Description	Status	Action
Lead	Ramesh Ramesh	Bonds	-	05-JUL-202..	10000	NA	Expired	
CIF	Rohit Shar..	Bonds	-	15-JUN-202..	35000	New Oppurt..	Expired	
Prospect	sachin	Bonds	-	11-MAY-202..	97000	2nd round ..	Expired	
- Date Filter Modal:** A modal window titled "Date" with fields for "From Date" and "To Date", and an "Apply" button.

Screen: From and To Date filter

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

intellect® Design for Digital

Welcome AKRITI Sharma AGARWAL
07-07-2022

Opportunity

Opportunity

Add Opportunity

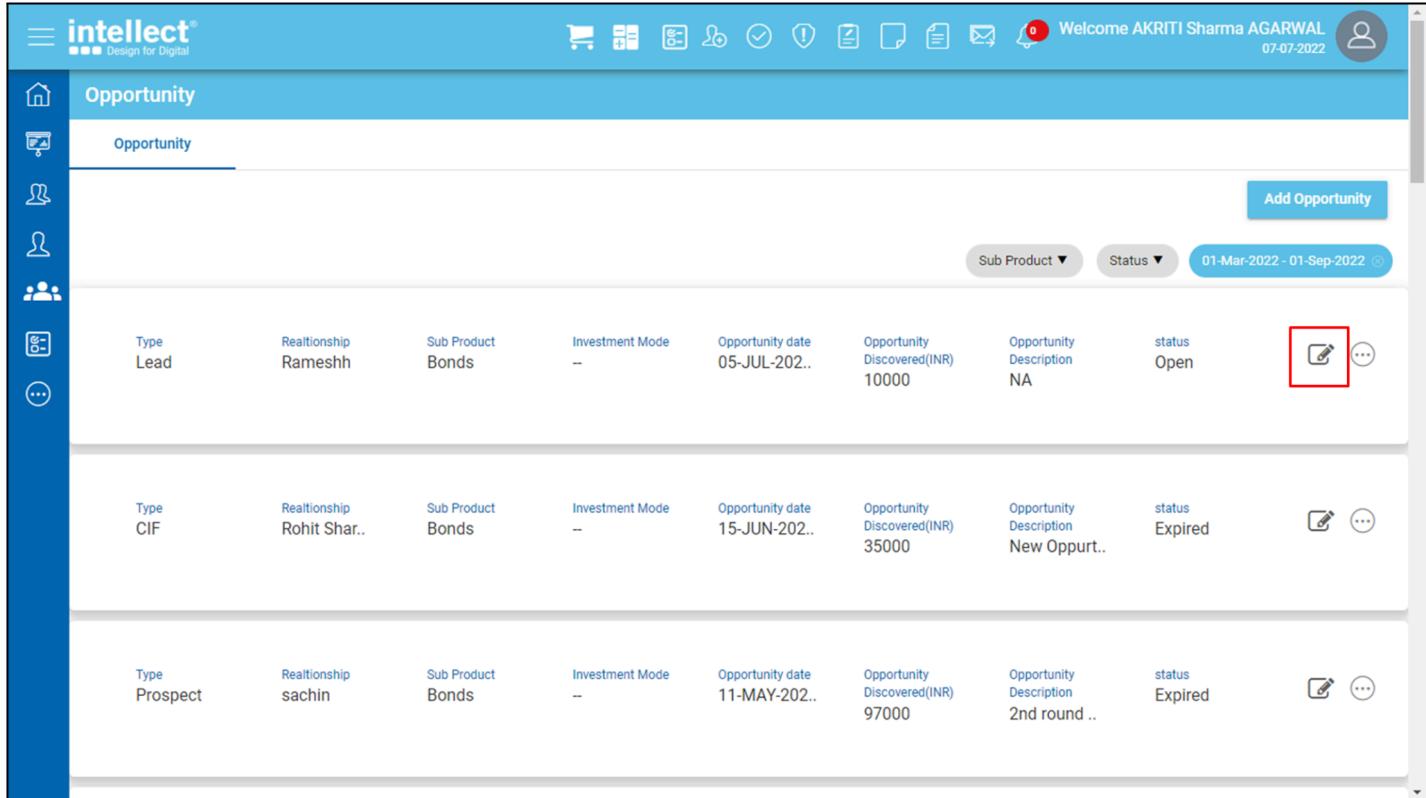
Sub Product ▾ Status ▾ 01-Mar-2022 - 01-Sep-2022

Type	Relationship	Sub Product	Investment Mode	Opportunity date	Opportunity Discovered(INR)	Opportunity Description	Status	Action	
Lead	Ramesh	Bonds	-	05-JUL-202..	10000	NA	Open		
CIF	Rohit Shar..	Bonds	-	15-JUN-202..	35000	New Oppurt..	Expired		
Prospect	sachin	Bonds	-	11-MAY-202..	97000	2nd round ..	Expired		

Screen: Opportunity displayed as per date selected

1.4.3 Modify an Opportunity

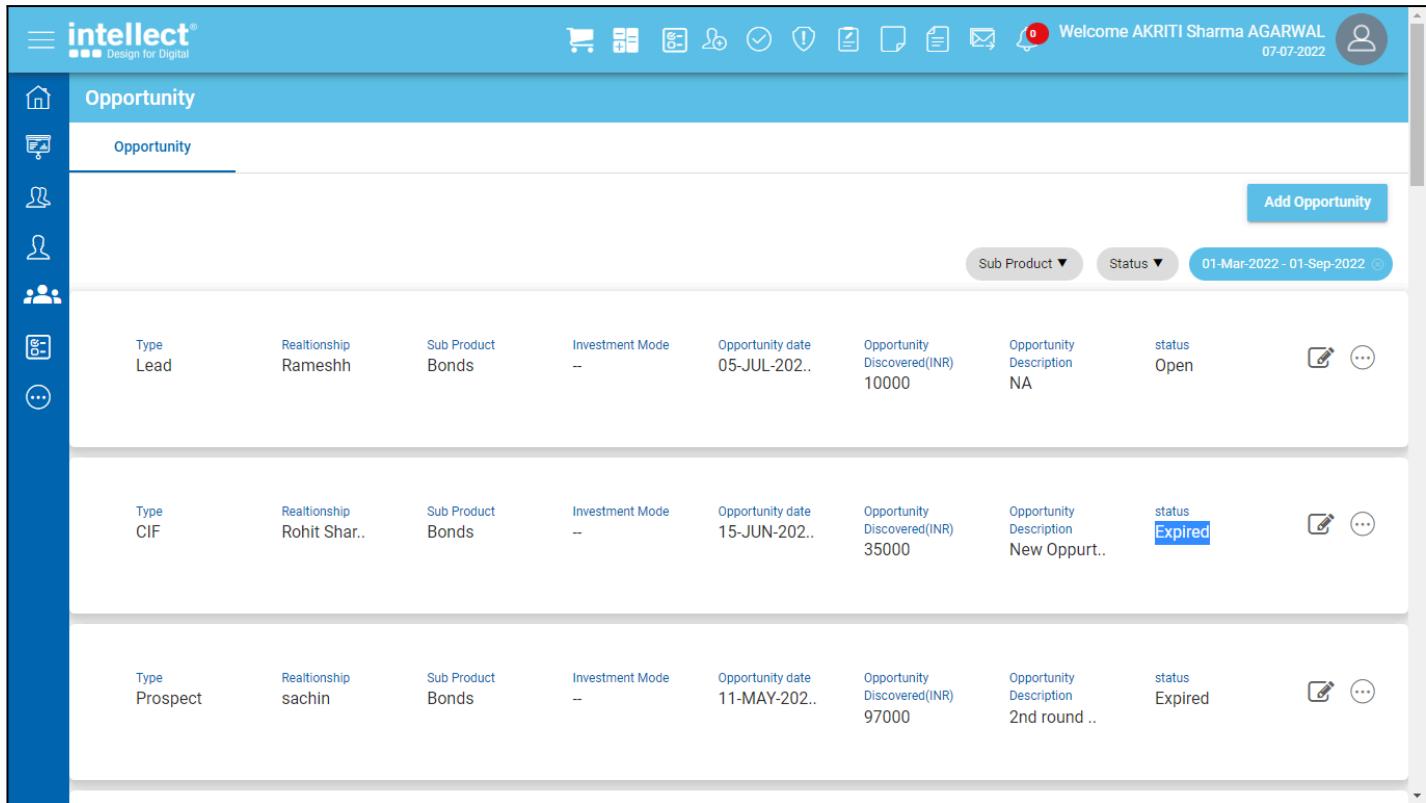
- User will click on the  button to modify the already captured opportunity which is in open status. If the Opportunity status is either “Closed” or “Aborted” or “Expired”, user will not be allowed to update the opportunity details



Type	Relationship	Sub Product	Investment Mode	Opportunity date	Opportunity Discovered(INR)	Opportunity Description	Status	Action
Lead	Rameshh	Bonds	-	05-JUL-202..	10000	NA	Open	
CIF	Rohit Shar..	Bonds	-	15-JUN-202..	35000	New Oppurt..	Expired	
Prospect	sachin	Bonds	-	11-MAY-202..	97000	2nd round ..	Expired	

Screen: Modify an Opportunity

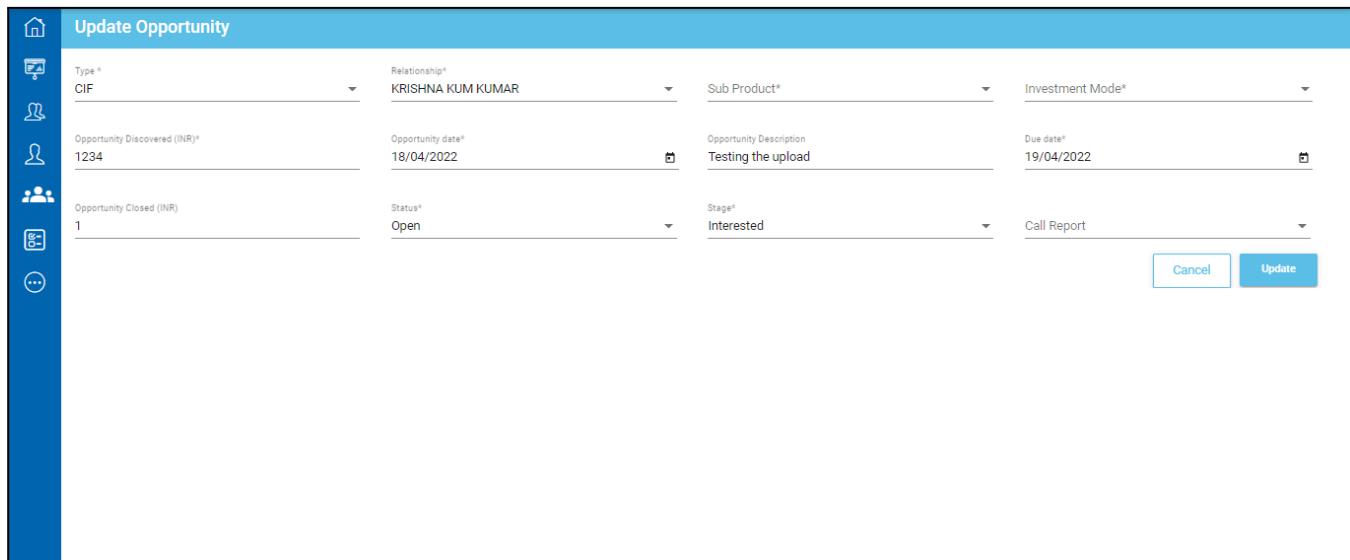
2. If the current business date has gone past the due date of the opportunity, the status of the opportunity will be updated as "Expired" in the system



Type	Relationship	Sub Product	Investment Mode	Opportunity date	Opportunity Discovered(INR)	Opportunity Description	Status
Lead	Ramesh Ramesh	Bonds	-	05-JUL-202..	10000	NA	Open
CIF	Rohit Shar..	Bonds	-	15-JUN-202..	35000	New Oppurt..	Expired
Prospect	sachin	Bonds	-	11-MAY-202..	97000	2nd round ..	Expired

Screen: Expired Opportunity Status

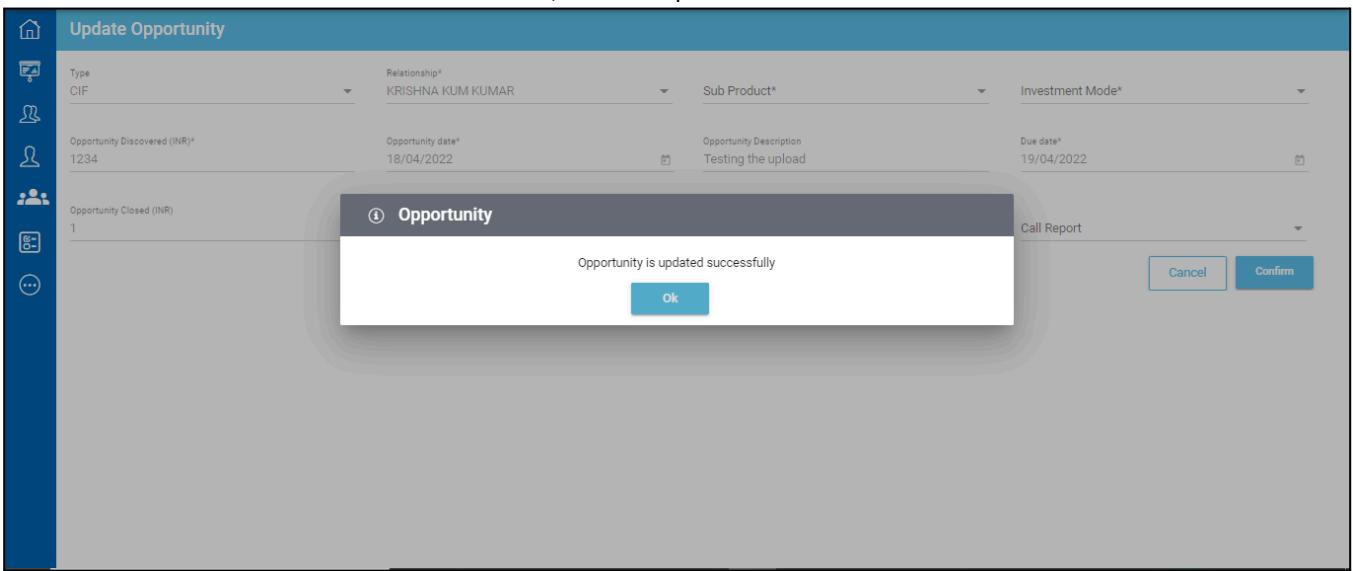
3. The editable fields will be Sub Product, Investment Mode, Opportunity Discovered (INR), Opportunity Date, Opportunity Description, Due Date, Opportunity Closed (INR), Status, Stage, Call report (Refer field level details)



Type*	Relationship*	Sub Product*	Investment Mode*
CIF	KRISHNA KUM KUMAR		
Opportunity Discovered (INR)*	Opportunity date*	Opportunity Description	Due date*
1234	18/04/2022	Testing the upload	19/04/2022
Opportunity Closed (INR)	Status*	Stage*	Call Report
1	Open	Interested	

Screen: Modify an opportunity

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



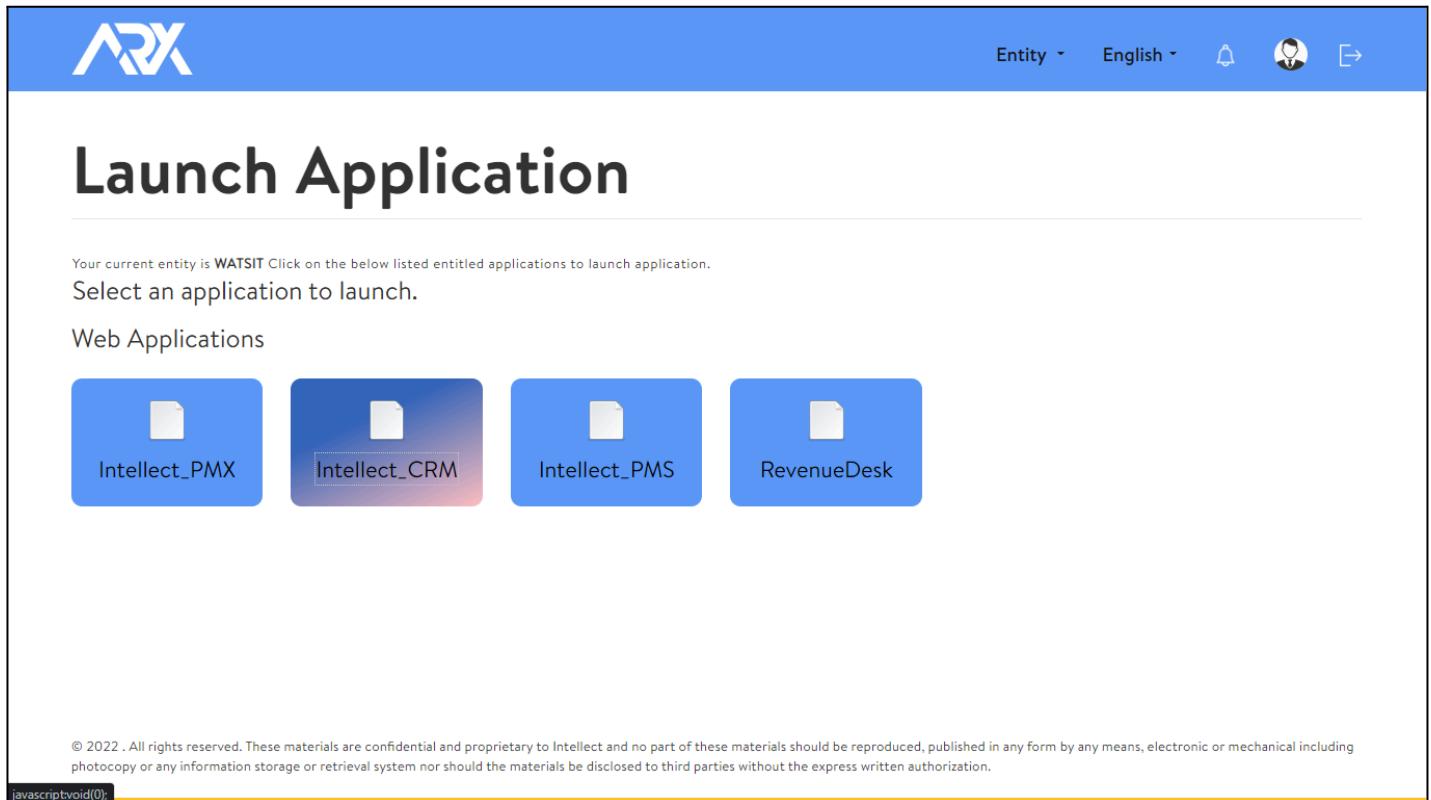
The screenshot shows the 'Update Opportunity' page. On the left is a sidebar with icons for Home, Opportunities, Contacts, Leads, and Reports. The main form has fields for Type (CIF), Relationship (KRISHNA KUM KUMAR), Sub Product, Investment Mode, Opportunity Discovered (INR) (1234), Opportunity date (18/04/2022), Due date (19/04/2022), Opportunity Description (Testing the upload), and Call Report. A modal window titled 'Opportunity' displays the message 'Opportunity is updated successfully' with an 'Ok' button. Below the modal are 'Cancel' and 'Confirm' buttons.

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

- User will log in to the application and navigate to "Intellect_CRM"



The screenshot shows the 'Launch Application' screen. At the top right are Entity (WATSIT), Language (English), a bell icon, and a user profile icon. Below the title 'Launch Application' is a message: 'Your current entity is WATSIT Click on the below listed entitled applications to launch application.' It says 'Select an application to launch.' Under 'Web Applications' are four buttons: 'Intellect_PMX', 'Intellect_CRM' (which is highlighted with a red gradient background), 'Intellect_PMS', and 'RevenueDesk'.

© 2022 . All rights reserved. These materials are confidential and proprietary to Intellect and no part of these materials should be reproduced, published in any form by any means, electronic or mechanical including photocopy or any information storage or retrieval system nor should the materials be disclosed to third parties without the express written authorization.

javascript:void(0);

Screen: Login screen

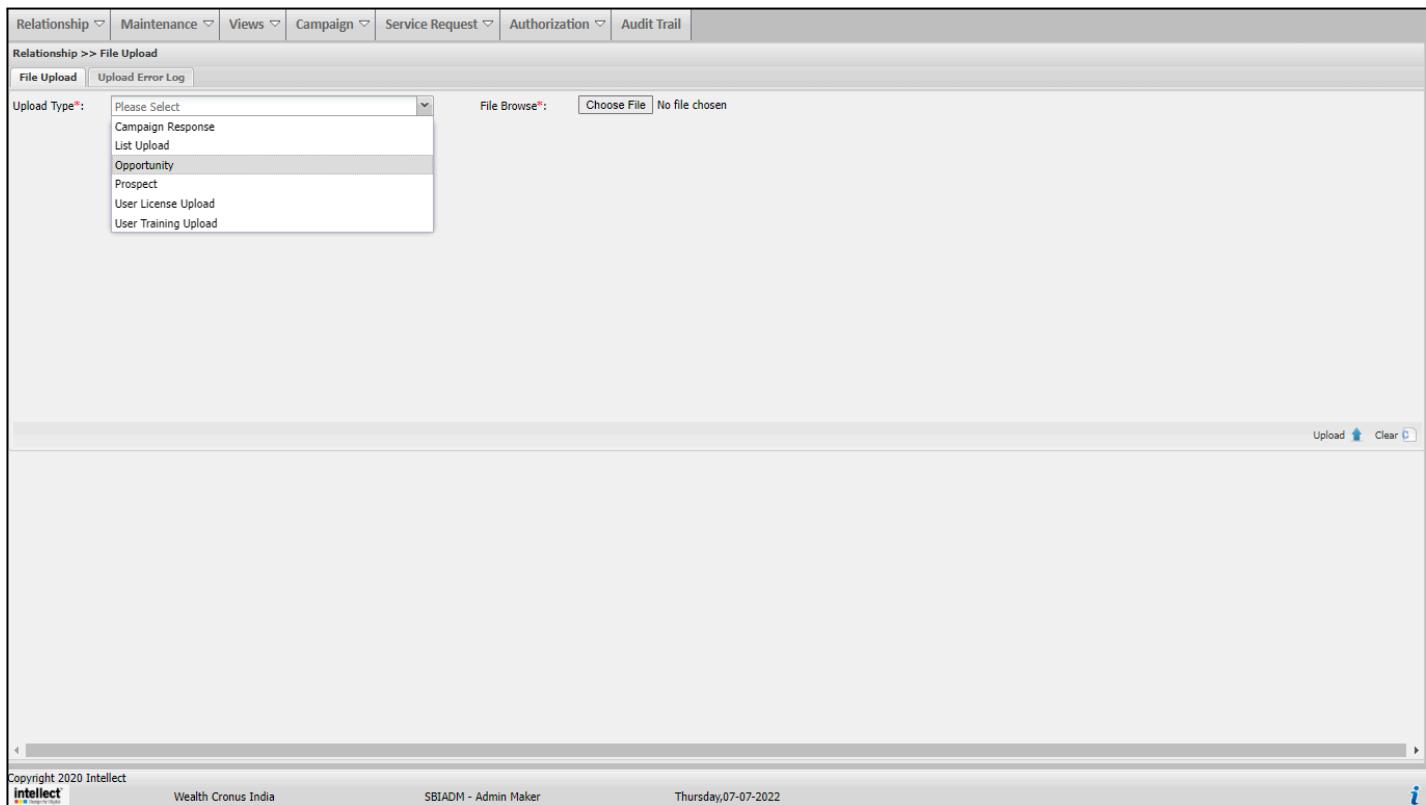
2. User will hover over “Relationship” and click on “File Upload”

Relationship	Maintenance	Views	Campaign	Service Request	Authorization	Audit Trail
Base						
Household						
Product Activation						
Family Grouping						
FID Grouping						
Delegation						
Product Subscription						
HandOver						
File Upload						

Copyright 2020 Intellect
javascript:openPage('#') Wealth Cronus India SBIADM - Admin Maker Thursday,07-07-2022 

Screen: Relationship >> File Upload

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



The screenshot shows a software interface for file upload. At the top, there is a navigation bar with links: Relationship, Maintenance, Views, Campaign, Service Request, Authorization, and Audit Trail. Below this is a breadcrumb trail: Relationship >> File Upload. The main area is titled "File Upload" and contains a "File Type*" dropdown menu. The menu is open, showing several options: Please Select, Campaign Response, List Upload, Opportunity (which is highlighted with a gray background), Prospect, User License Upload, and User Training Upload. To the right of the dropdown is a "File Browse*" button and a "Choose File" button, both of which are currently inactive (grayed out). At the bottom right of the interface are two buttons: "Upload" with a blue arrow icon and "Clear" with a trash can icon.

Screen: Select Opportunity file upload

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

The screenshot shows a software interface titled "Relationship >> File Upload". At the top, there is a navigation bar with tabs: Relationship, Maintenance, Views, Campaign, Service Request, Authorization, and Audit Trail. Below the navigation bar, the main area has two tabs: "File Upload" (which is selected) and "Upload Error Log". Under the "File Upload" tab, there are two input fields: "Upload Type*" with a dropdown menu showing "Opportunity" and "File Browse*:" with a "Choose File" button and a message "No file chosen". A red error message "This field is required" is displayed below the "File Browse" field. At the bottom right of the main area, there are "Upload" and "Clear" buttons. The footer of the screen contains copyright information: "Copyright 2020 Intellect", "Wealth Cronus India", "SBIADM - Admin Maker", and the date "Thursday,07-07-2022". On the far right of the footer, there is an "i" icon.

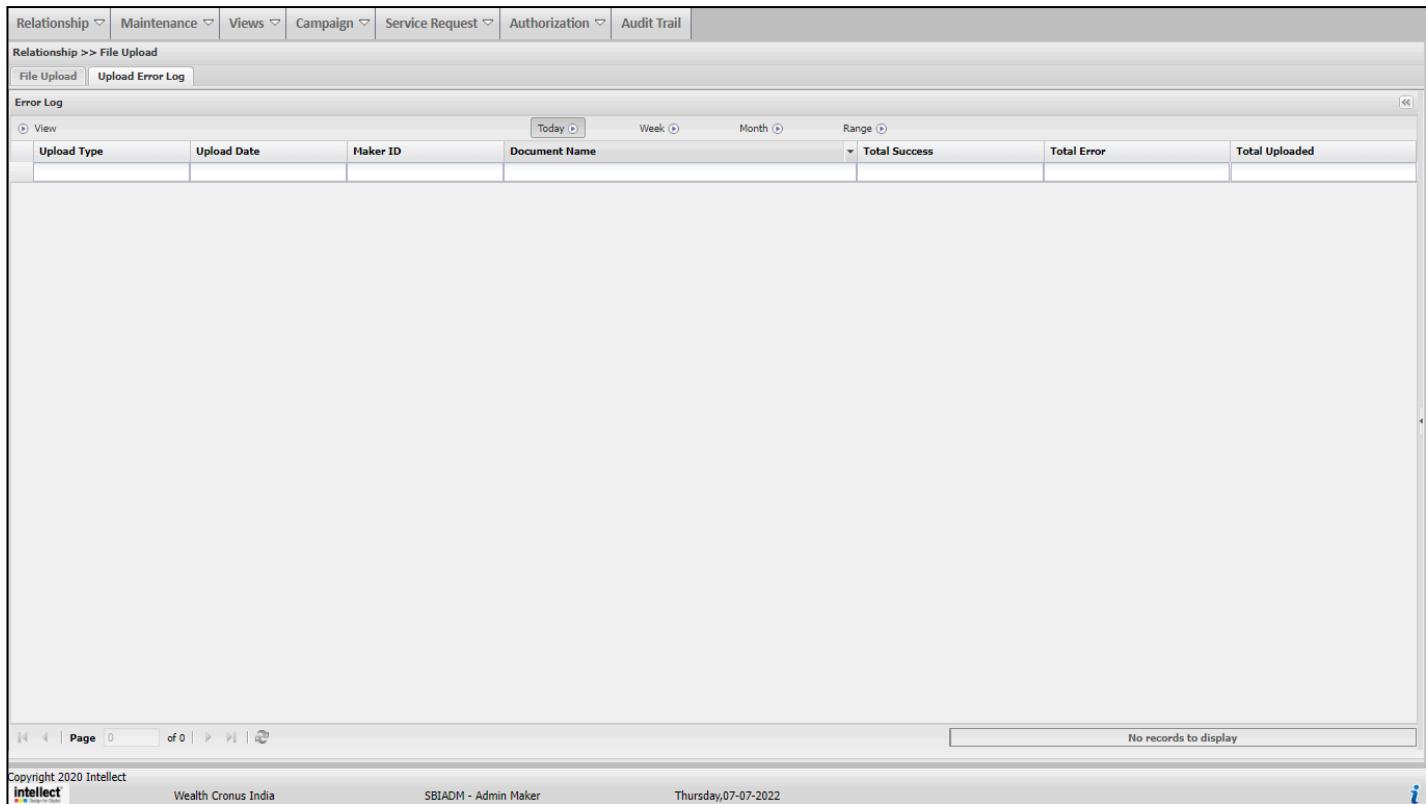
Screen: Select File to be uploaded

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

The screenshot shows a software interface titled "Relationship >> File Upload". At the top, there is a navigation bar with tabs: Relationship, Maintenance, Views, Campaign, Service Request, Authorization, and Audit Trail. Below the navigation bar, the main area is titled "File Upload" and "Upload Error Log". A dropdown menu labeled "Upload Type*" is set to "Opportunity". To its right is a "File Browse*" field containing the path "Choose File BulkUserUploadJune17..rsfirstallusers (1) (1).xls". At the bottom right of the main area are two buttons: "Upload" with a blue arrow icon and "Clear" with a trash can icon. The footer of the screen contains copyright information: "Copyright 2020 Intellect", "Wealth Cronus India", "SBIADM - Admin Maker", and the date "Thursday,07-07-2022". On the far right of the footer is a small blue information icon.

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



The screenshot shows a software interface titled "Relationship >> File Upload". Under "File Upload", the "Upload Error Log" tab is selected. The main area is titled "Error Log" and contains a table with columns: Upload Type, Upload Date, Maker ID, Document Name, Total Success, Total Error, and Total Uploaded. A toolbar above the table includes "View" (with options Today, Week, Month, Range), and filters for each column. Below the table are navigation buttons (Page, of 0, etc.) and a message "No records to display". At the bottom, there is copyright information: "Copyright 2020 Intellect", "Wealth Cronus India", "SBIADM - Admin Maker", "Thursday,07-07-2022", and a help icon.

Screen: Upload Error log screen

8. The allowed formats for upload are xls,xlsx.
9. The format of the upload template is as below



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”

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



Your current entity is **Intellect** Click on the below listed entitled applications to launch application.

Select an application to launch.

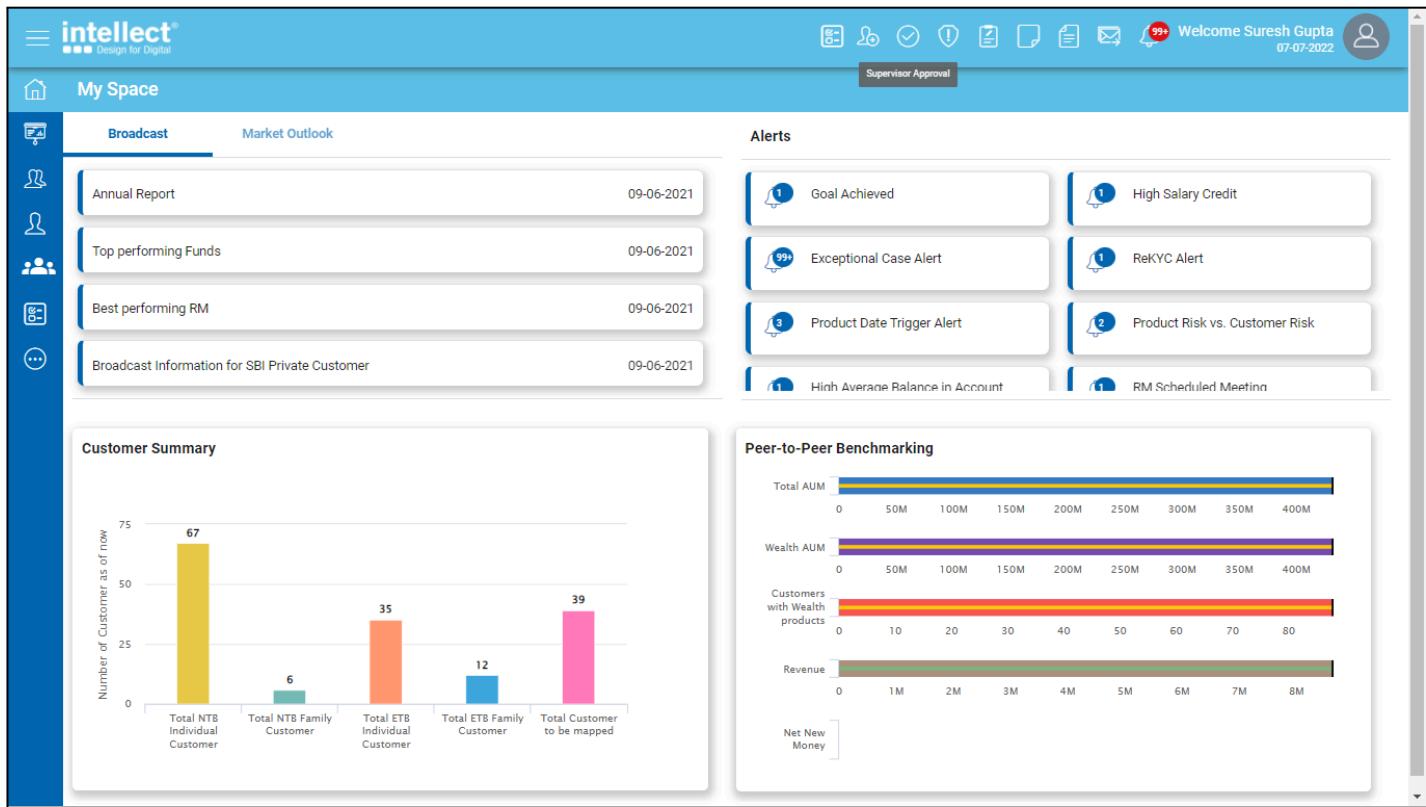
Web Applications



© 2020 . All rights reserved. These materials are confidential and proprietary to Intellect and no part of these materials should be reproduced, published in any form by any means, electronic or mechanical including photocopy or any information storage or retrieval system nor should the materials be disclosed to third parties without the express written authorization.

Screen: Supervisor Login

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



The screenshot displays the Intellect supervisor approval workspace. At the top, there's a navigation bar with icons for Broadcast, Market Outlook, and Alerts. The Alerts section shows several notifications: Goal Achieved, High Salary Credit, Exceptional Case Alert, ReKYC Alert, Product Date Trigger Alert, Product Risk vs. Customer Risk, High Average Balance in Account, and RM Scheduled Meeting.

Below the navigation bar, there are two main sections: "Customer Summary" and "Peer-to-Peer Benchmarking".

Customer Summary: This section contains a bar chart titled "Customer Summary" showing the number of customers as of now across five categories. The data is as follows:

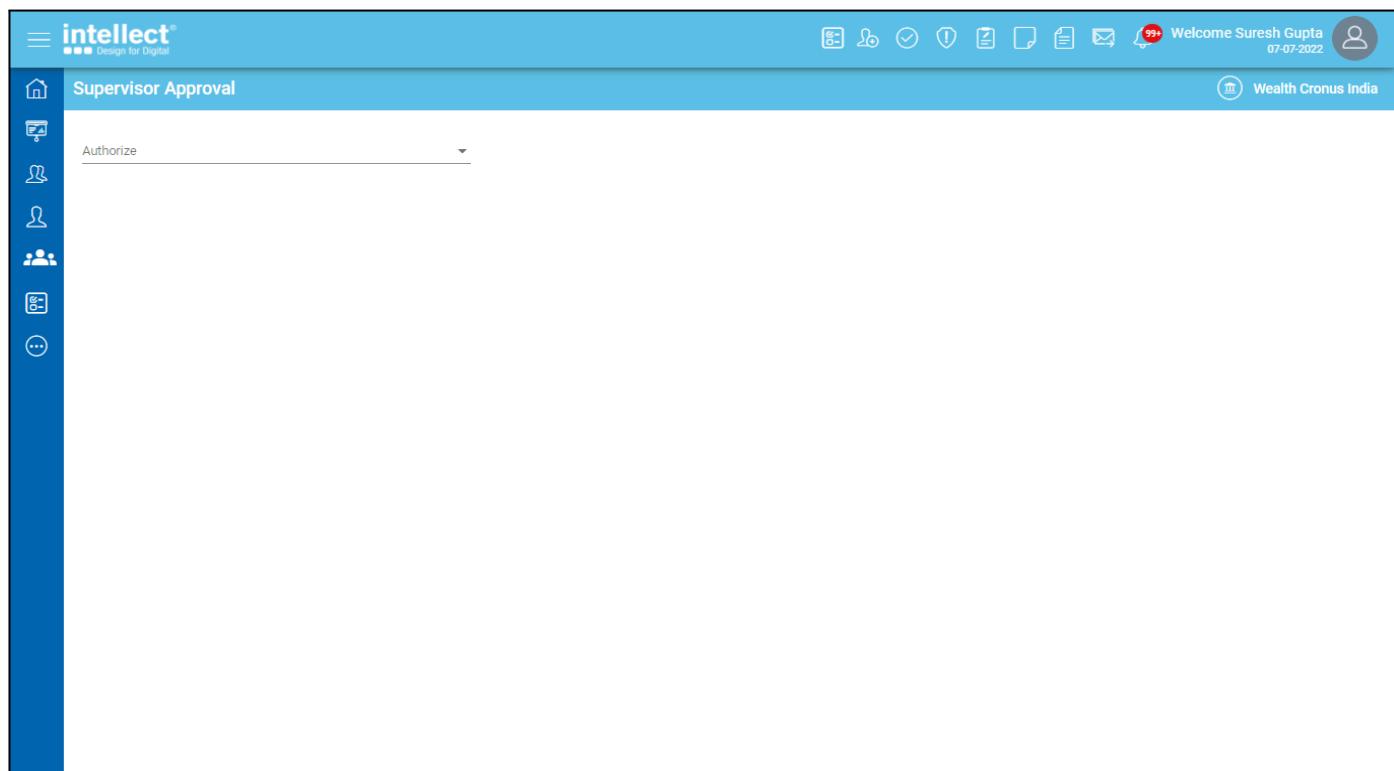
Category	Number of Customers
Total NTB Individual Customer	67
Total NTB Family Customer	6
Total ETB Individual Customer	35
Total ETB Family Customer	12
Total Customer to be mapped	39

Peer-to-Peer Benchmarking: This section contains four horizontal bar charts comparing performance metrics across different entities. The data is as follows:

Metric	Value
Total AUM	400M
Wealth AUM	400M
Customers with Wealth Products	80
Revenue	8M
Net New Money	8M

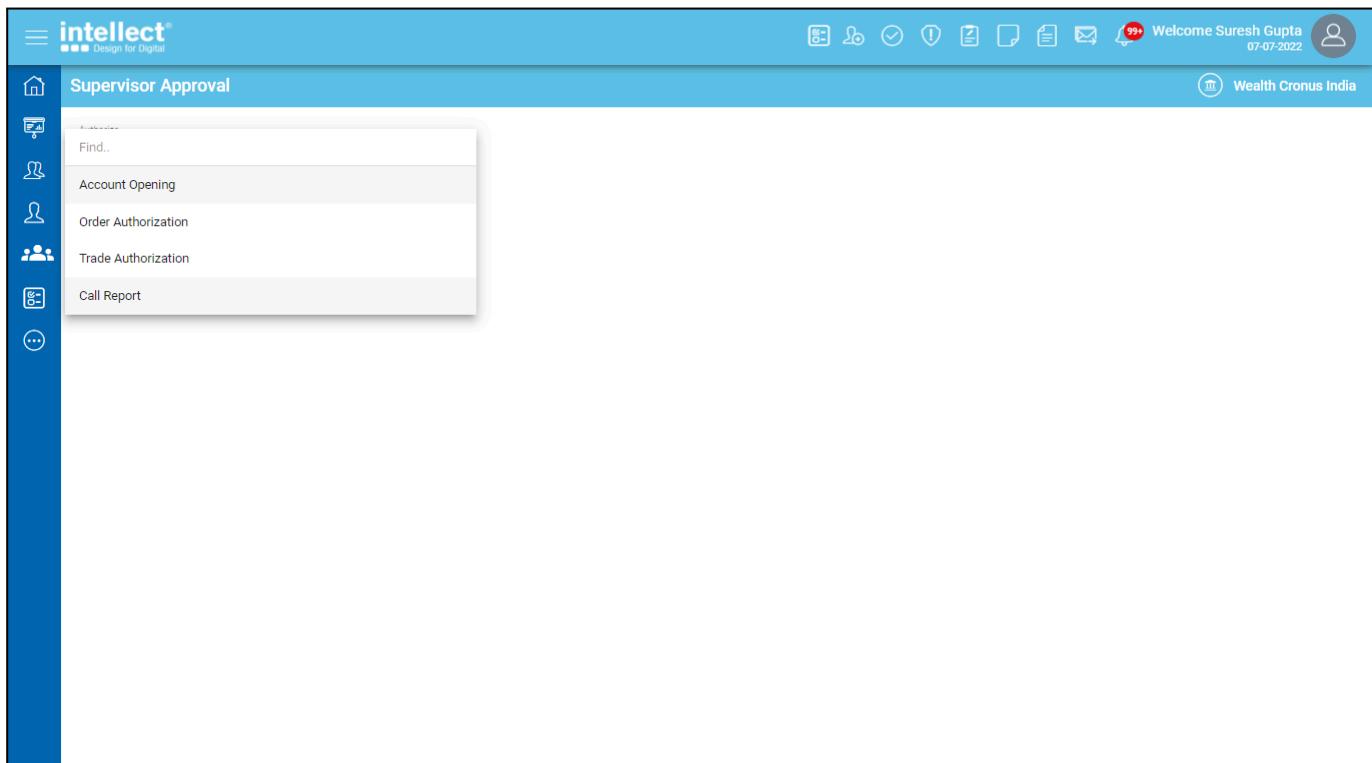
Screen: Supervisor Approval

3. The supervisor can then click on the “Authorize” menu



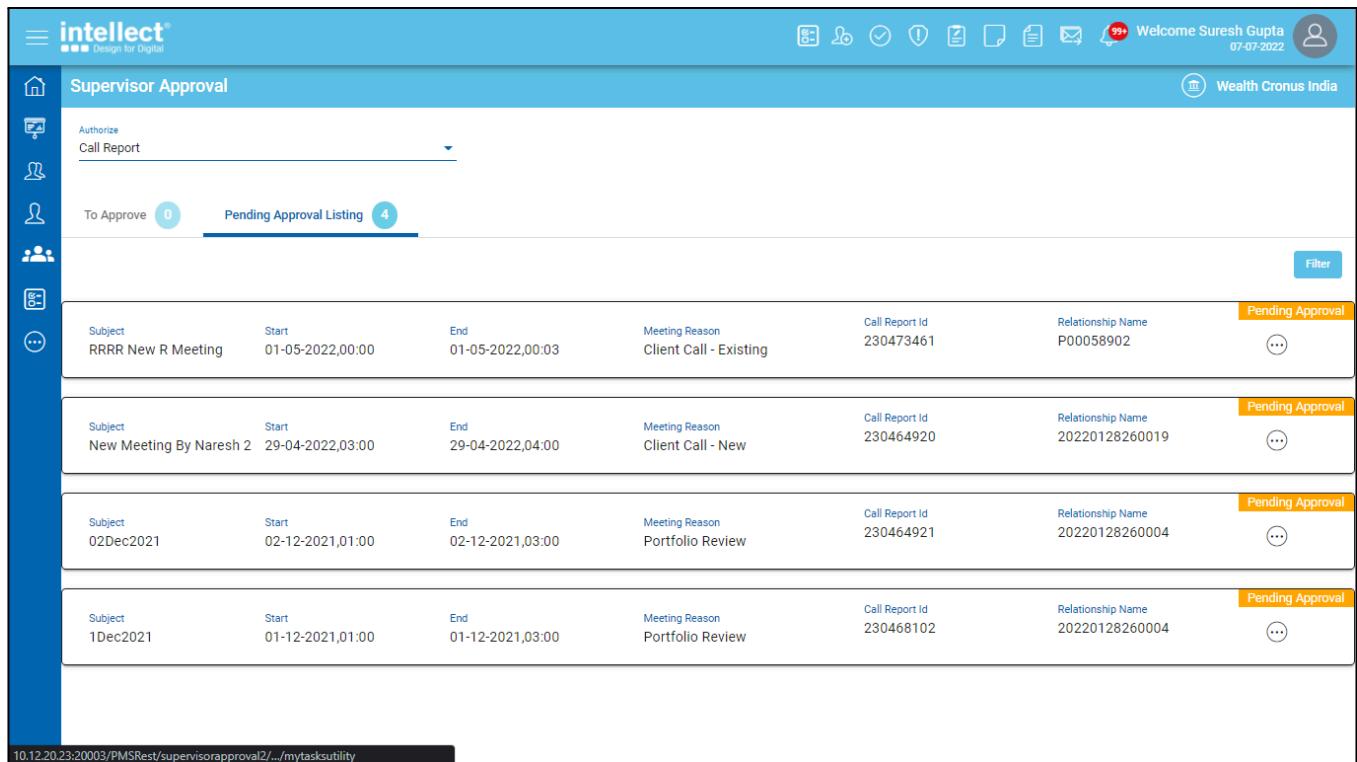
Screen: Authorize dropdown

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



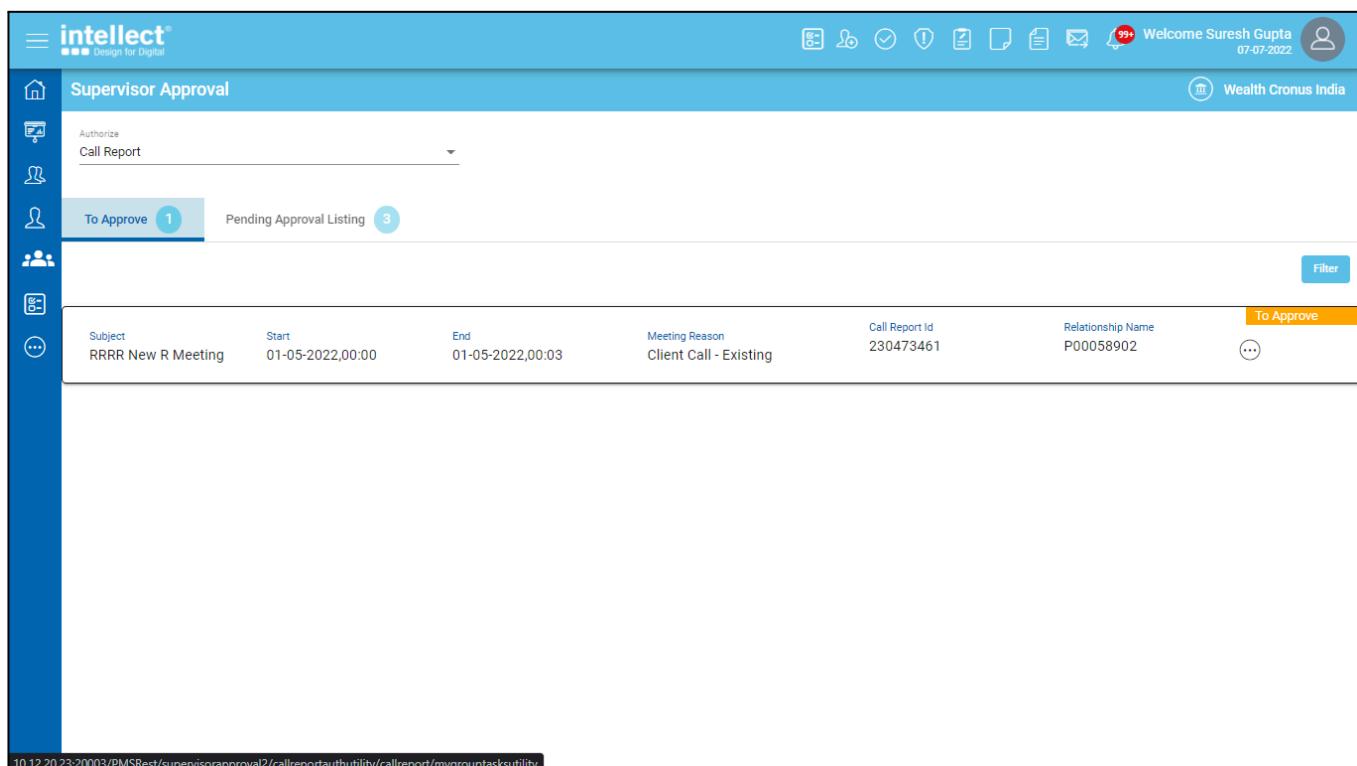
The screenshot shows the 'Supervisor Approval' interface. In the top navigation bar, there are icons for Home, Authorize, Call Report, and a user profile for Suresh Gupta (07-07-2022). The main area is titled 'Pending Approval Listing' (4 items). It displays four call reports with the following details:

Subject	Start	End	Meeting Reason	Call Report Id	Relationship Name	Status
RRRR New R Meeting	01-05-2022,00:00	01-05-2022,00:03	Client Call - Existing	230473461	P00058902	Pending Approval
New Meeting By Naresh 2	29-04-2022,03:00	29-04-2022,04:00	Client Call - New	230464920	20220128260019	Pending Approval
02Dec2021	02-12-2021,01:00	02-12-2021,03:00	Portfolio Review	230464921	20220128260004	Pending Approval
1Dec2021	01-12-2021,01:00	01-12-2021,03:00	Portfolio Review	230468102	20220128260004	Pending Approval

At the bottom left, the URL is visible: 10.12.20.23:20003/PMSRest/supervisorapproval2/.../mytasksutility

Screen: Pending for Approval

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



The screenshot shows the 'Supervisor Approval' interface. In the top navigation bar, there are icons for Home, Authorize, Call Report, and a user profile for Suresh Gupta (07-07-2022). The main area is titled 'To Approve' (1 item). It displays one call report with the following details:

Subject	Start	End	Meeting Reason	Call Report Id	Relationship Name	Status
RRRR New R Meeting	01-05-2022,00:00	01-05-2022,00:03	Client Call - Existing	230473461	P00058902	To Approve

At the bottom left, the URL is visible: 10.12.20.23:20003/PMSRest/supervisorapproval2/callreportauthutility/callreport/mygroupTasksUtility

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

<input checked="" type="checkbox"/>	Subject Meeting with team	Start 13-10-2021,13:00	End 13-10-2021,14:00	Meeting Reason Client Call - New	Call Report Id 230103421	Relationship Name A489793	
-------------------------------------	------------------------------	---------------------------	-------------------------	-------------------------------------	-----------------------------	------------------------------	---

Screen: Call Report approval card collapsed view

<input checked="" type="checkbox"/>	Subject Meeting with team	Start 13-10-2021,13:00	End 13-10-2021,14:00	Meeting Reason Client Call - New	Call Report Id 230103421	Relationship Name A489793	
Call Report Created By 00203753-Winfrid	RM Id 00203753-Winfrid	Meeting Id 230103401	Call Report Status Pending_Approval	Location customer office	Legal Entity State Bank of India		
Meeting Created By 00203753-Winfrid	Relationship Type CIF	Relationship Number A489793					

Screen: Call Report approval card expanded view

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

<input checked="" type="checkbox"/>	Subject Meeting with team	Start 13-10-2021,13:00	End 13-10-2021,14:00	Meeting Reason Client Call - New	Call Report Id 230103421	Relationship Name A489793	
Call Report Created By 00203753-Winfrid	RM Id 00203753-Winfrid	Meeting Id 230103401	Call Report Status Pending_Approval	Location customer office	Legal Entity State Bank of India		
Meeting Created By 00203753-Winfrid	Relationship Type CIF	Relationship Number A489793					

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

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

View Call Report

Meeting Particulars

Meeting Reason*	Client Call - Existing		
Subject*	RRRR New R Meeting		
Start Date*	5/1/2022	Start Time*	00:00
End Date*	5/1/2022	End Time*	00:03
Location*	Hyderabad		
Client Status			
Next Meeting Start Date			
Next Meeting Start Time			
Next Meeting End Date			
Next Meeting End Time			
State Of Mind			

Screen: Call report details

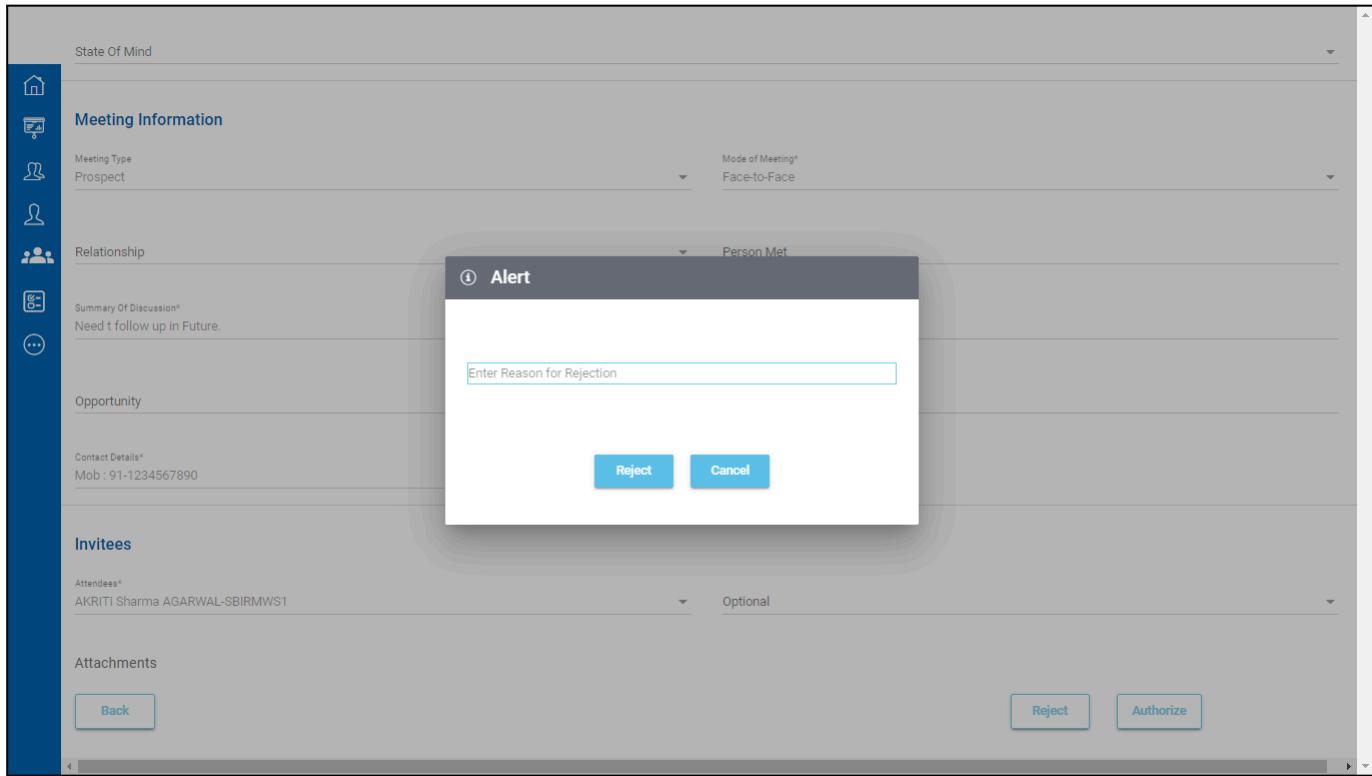
11. The supervisor can review the details and click on “Authorize” to approve it

Meeting Information

Meeting Type	Prospect	Mode of Meeting*	Face-to-Face
Relationship	Person Met		
Summary Of Discussion*	Remarks		
Need t follow up in Future.			
Opportunity	Opportunity Date		
Contact Details*	Remarks		
Mob : 91-1234567890			
Invitees			
Attendees*	AKRITI Sharma AGARWAL-SBIRMW51		
Attachments	Optional		
Back	Reject	Authorize	

Screen: Authorize tab for call report

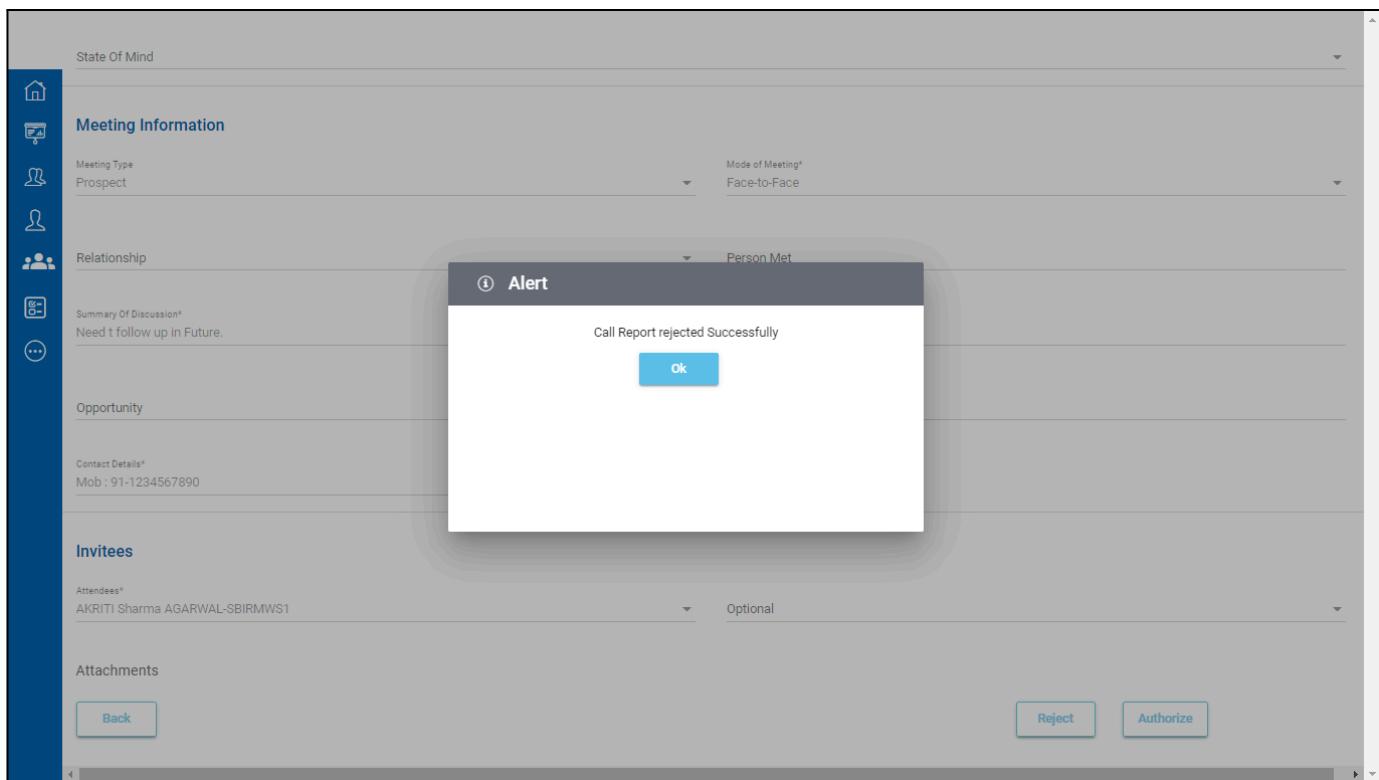
12. In case of any issues, the supervisor can click on “Reject”
13. The system will prompt the supervisor to enter the rejection reason



The screenshot shows a software application window titled "Meeting Information". On the left, there is a vertical sidebar with icons for Home, Meeting, People, and More. The main area contains fields for "State Of Mind", "Meeting Type" (Prospect), "Mode of Meeting*" (Face-to-Face), "Relationship", "Summary Of Discussion*", "Person Met", "Opportunity", "Contact Details*" (Mob.: 91-1234567890), and "Attendees" (AKRITI Sharma AGARWAL-SBIRMWS1). A modal dialog box titled "Alert" is centered over the form, containing a text input field labeled "Enter Reason for Rejection" and two buttons: "Reject" and "Cancel". At the bottom right of the main form, there are "Back", "Reject", and "Authorize" buttons.

Screen: Rejection reason

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



The screenshot shows a meeting information form. On the left is a vertical sidebar with icons for Home, Prospect, Relationship, Summary Of Discussion, Opportunity, Contact Details, and Invitees. The main area has fields for State Of Mind, Meeting Type (Prospect), Mode of Meeting (Face-to-Face), Relationship, Person Met, Summary Of Discussion (containing 'Need t follow up in Future.'), and Contact Details (Mob : 91-1234567890). A modal window titled 'Alert' is displayed in the center, stating 'Call Report rejected Successfully' with an 'Ok' button. At the bottom right of the main form are 'Reject' and 'Authorize' buttons.

Screen: Call report rejected

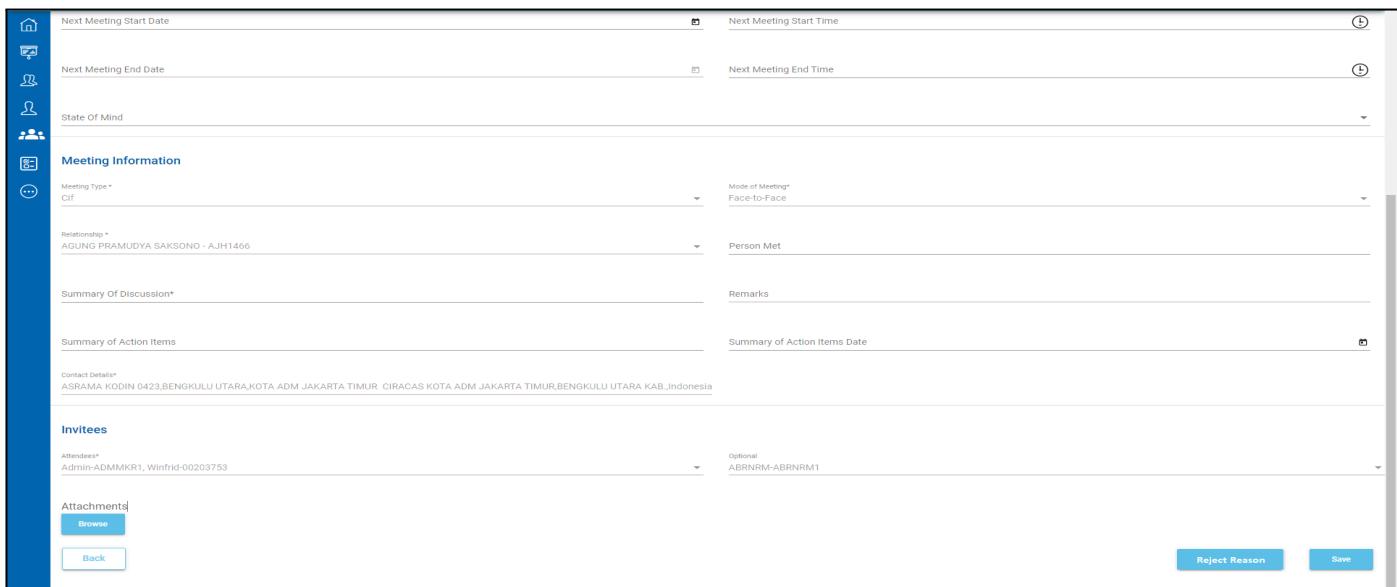
15. The rejection reason will be saved in the system and the same will be displayed to the RM
16. RM can check for the rejection reason from the call report
17. RM will search for the desired card and click on “File Call Report”



Subject	Meeting with team	Start	13-10-2021,13:00	End	13-10-2021,14:00	Meeting Reason	Client Call - New	View	Feedback	File Call Report	Download	Rejected
---------	-------------------	-------	------------------	-----	------------------	----------------	-------------------	----------------------	--------------------------	----------------------------------	--------------------------	-----------------------

Screen: Rejected Call Report

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



The screenshot shows a form titled "Rejected Call report details". It includes sections for "Meeting Information" (Next Meeting Start Date, Next Meeting End Date, State Of Mind), "Meeting Type" (Cif), "Relationship" (AGUNG PRAMUDYA SAKSONO - AJH1466), "Mode of Meeting" (Face-to-Face), "Person Met", "Summary Of Discussion", "Remarks", "Summary of Action Items", "Contact Details" (ASRAMA KODIN 0423,BENGKULU UTARA,KOTA ADM JAKARTA TIMUR, CIRACAS KOTA ADM JAKARTA TIMUR,BENGKULU UTARA KAB.,Indonesia), "Invitees" (Attendee: Admin-ADMMKR1, Winfrid-00203753), "Optional" (ABRNRM-ABRNRM1), and "Attachments" (Browse, Back). At the bottom right are "Reject Reason" and "Save" buttons.

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”

intellect®
Design for Digital

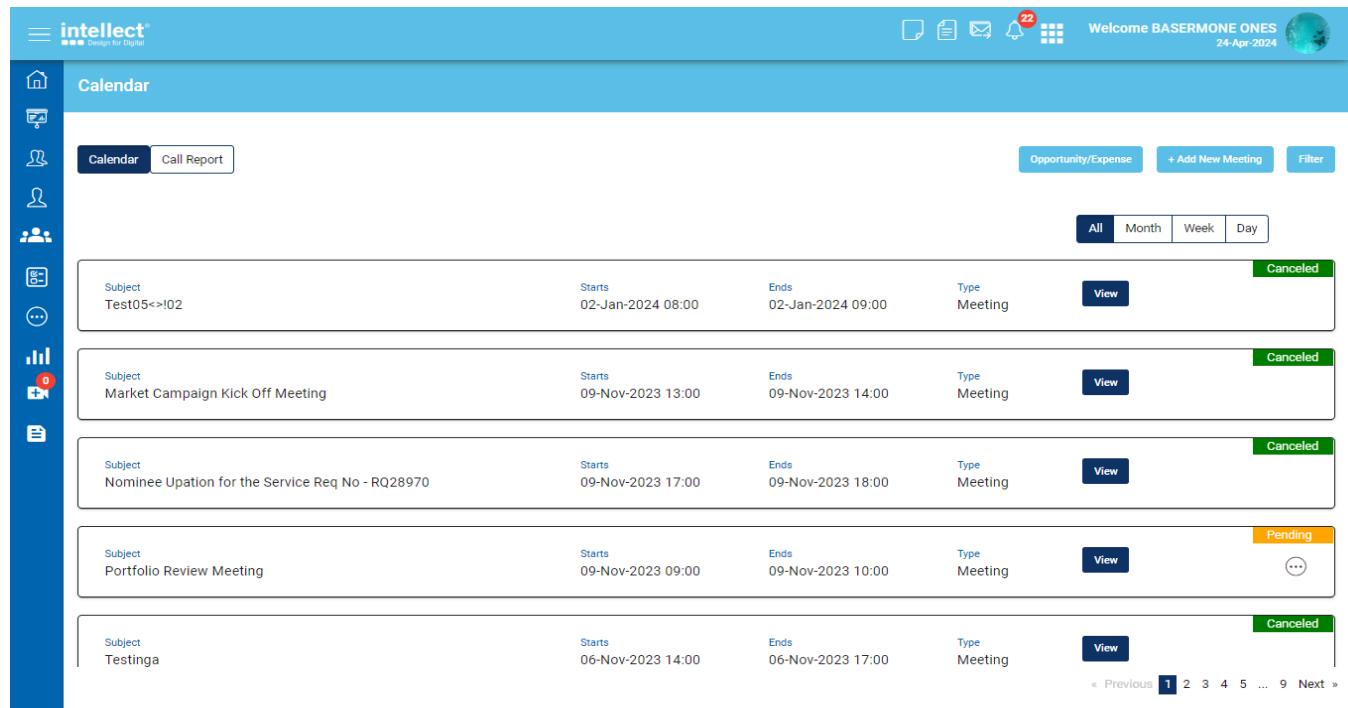
Welcome Suresh Gupta
07-07-2022

Subject	Start	End	Meeting Reason	Action Buttons	Status
Portfolio review	07-07-2022,14:00	07-07-2022,15:00	Portfolio Review	View Feedback File Call Report Download	Pending
MEETING	07-07-2022,16:00	07-07-2022,18:00	Portfolio Review	View Feedback File Call Report Download	Completed
Portfolio Review Meeting	07-07-2022,10:00	07-07-2022,13:00	Portfolio Review	View Feedback File Call Report Download	Completed
NEW CUST Visiting-11 July 2022	04-07-2022,00:00	04-07-2022,00:03	Branch Visit	View Feedback File Call Report Download	Completed
Testing Add meeting	02-07-2022,01:00	02-07-2022,02:00	Client Call - New	View Feedback File Call Report Download	Pending
Testing from customer dashboard	02-07-2022,05:00	02-07-2022,06:00	Client Call - Existing	View Feedback File Call Report Download	Completed

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.



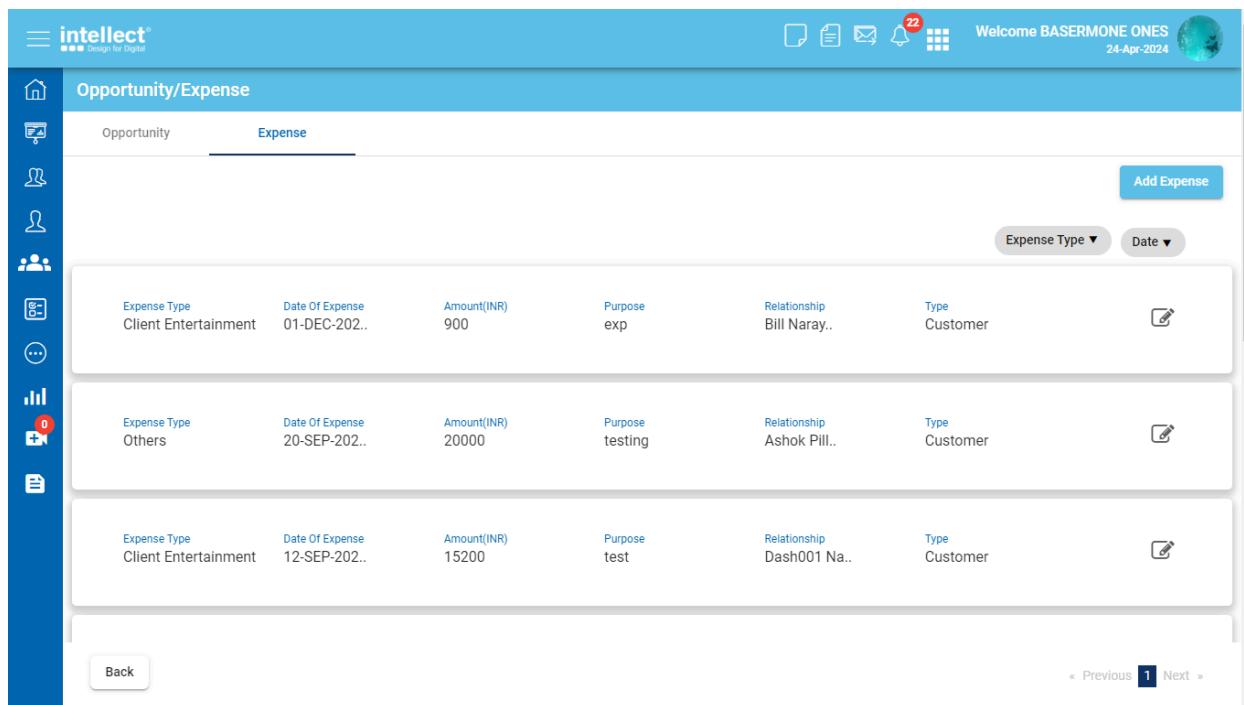
The screenshot shows the intellect RM Office interface. On the left is a vertical sidebar with icons for Home, Calendar, Call Report, and other features. The main header bar includes the intellect logo, a message center with 22 notifications, and a welcome message for 'BASERMONE ONES' dated '24-Apr-2024'. Below the header, the title 'Calendar' is displayed. In the top right corner of the main area, there are buttons for 'Opportunity/Expense', '+ Add New Meeting', and 'Filter'. Below these are buttons for 'All', 'Month', 'Week', and 'Day'. The main content area displays a list of five meetings:

Subject	Starts	Ends	Type	Status
Test05<>I02	02-Jan-2024 08:00	02-Jan-2024 09:00	Meeting	Canceled
Market Campaign Kick Off Meeting	09-Nov-2023 13:00	09-Nov-2023 14:00	Meeting	Canceled
Nominee Upation for the Service Req No - RQ28970	09-Nov-2023 17:00	09-Nov-2023 18:00	Meeting	Canceled
Portfolio Review Meeting	09-Nov-2023 09:00	09-Nov-2023 10:00	Meeting	Pending
Testinga	06-Nov-2023 14:00	06-Nov-2023 17:00	Meeting	Canceled

At the bottom of the list, there are navigation buttons for 'Previous' and 'Next' with page numbers 1 through 9.

Screen: Calendar > Opportunity/Expense

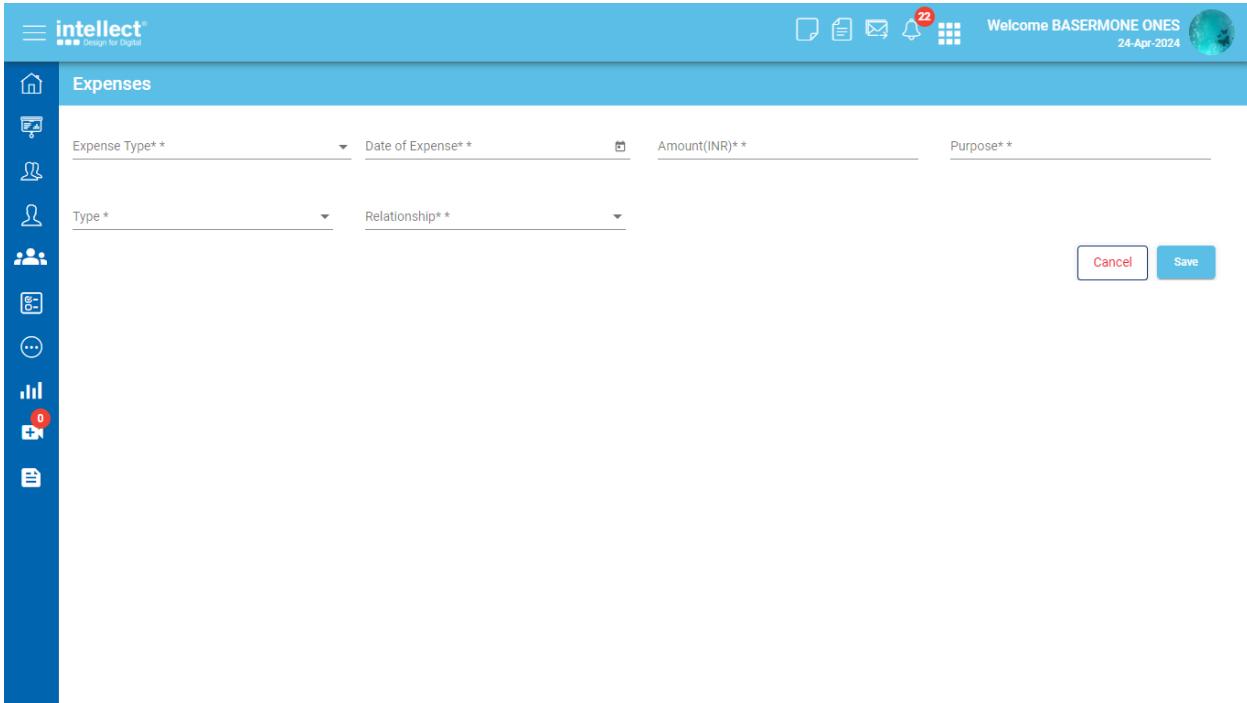
4. In the “expense” tab, all the expenses that are currently captured in the system will be displayed and sorted as per the expense date in descending order.
5. A filter on “Expense Type” will be available for the user to filter the expense cards.
6. User will also have the option to filter the expense 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.



Expense Type	Date Of Expense	Amount(INR)	Purpose	Relationship	Type	Action
Client Entertainment	01-DEC-202..	900	exp	Bill Naray..	Customer	
Others	20-SEP-202..	20000	testing	Ashok Pill..	Customer	
Client Entertainment	12-SEP-202..	15200	test	Dash001 Na..	Customer	

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.



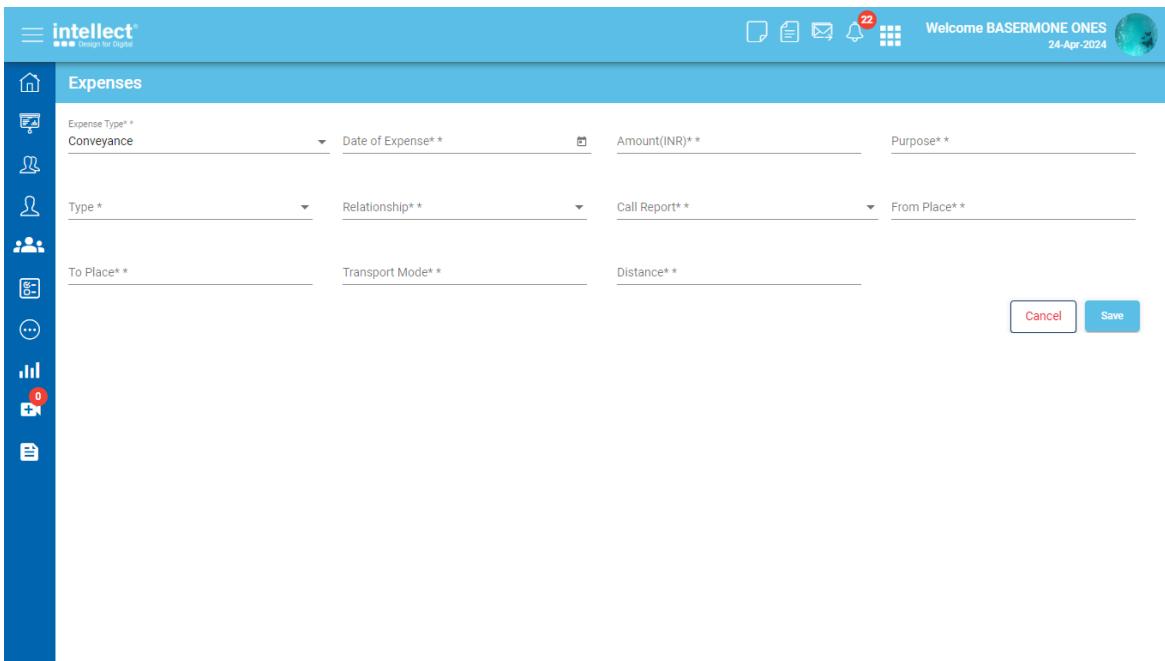
The screenshot shows the 'Expenses' section of the Intellect application. At the top, there are navigation icons and a welcome message for 'BASERMONE ONES' dated '24-Apr-2024'. Below the header, the main form has the following fields:

- Expense Type***: A dropdown menu currently set to 'Conveyance'.
- Date of Expense***: A date input field.
- Amount(INR)***: An input field.
- Purpose***: A text input field.
- Type***: A dropdown menu.
- Relationship***: A dropdown menu.

At the bottom right of the form are 'Cancel' and 'Save' buttons.

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.



This screenshot shows the same expense capture screen as above, but with the 'Expense Type*' dropdown set to 'Conveyance'. This triggers the display of five additional fields:

- Call Report***: A dropdown menu.
- From Place***: A text input field.
- To Place***: A text input field.
- Transport Mode***: A dropdown menu.
- Distance***: A text input field.

The rest of the form (Date of Expense, Amount, Purpose, Type, Relationship) remains the same as in the previous screenshot.

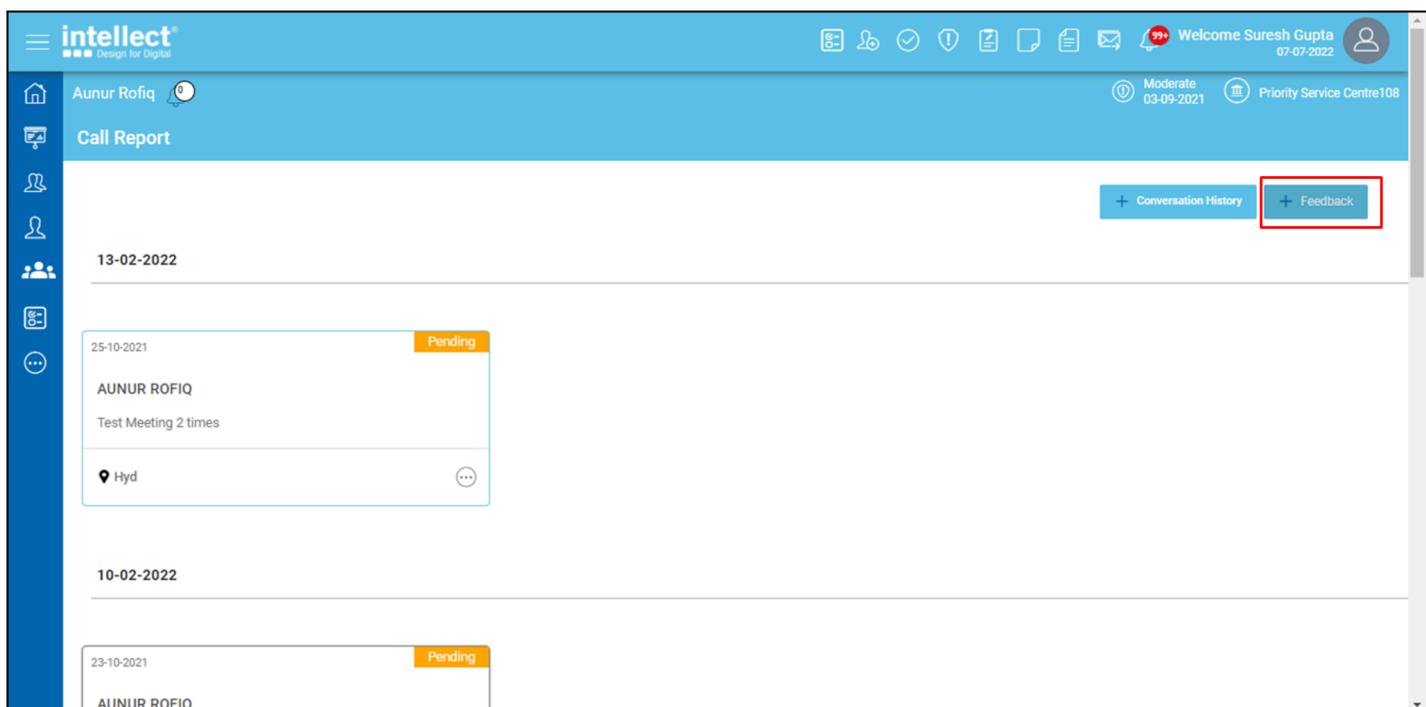
Screen – Capture conveyance expense

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

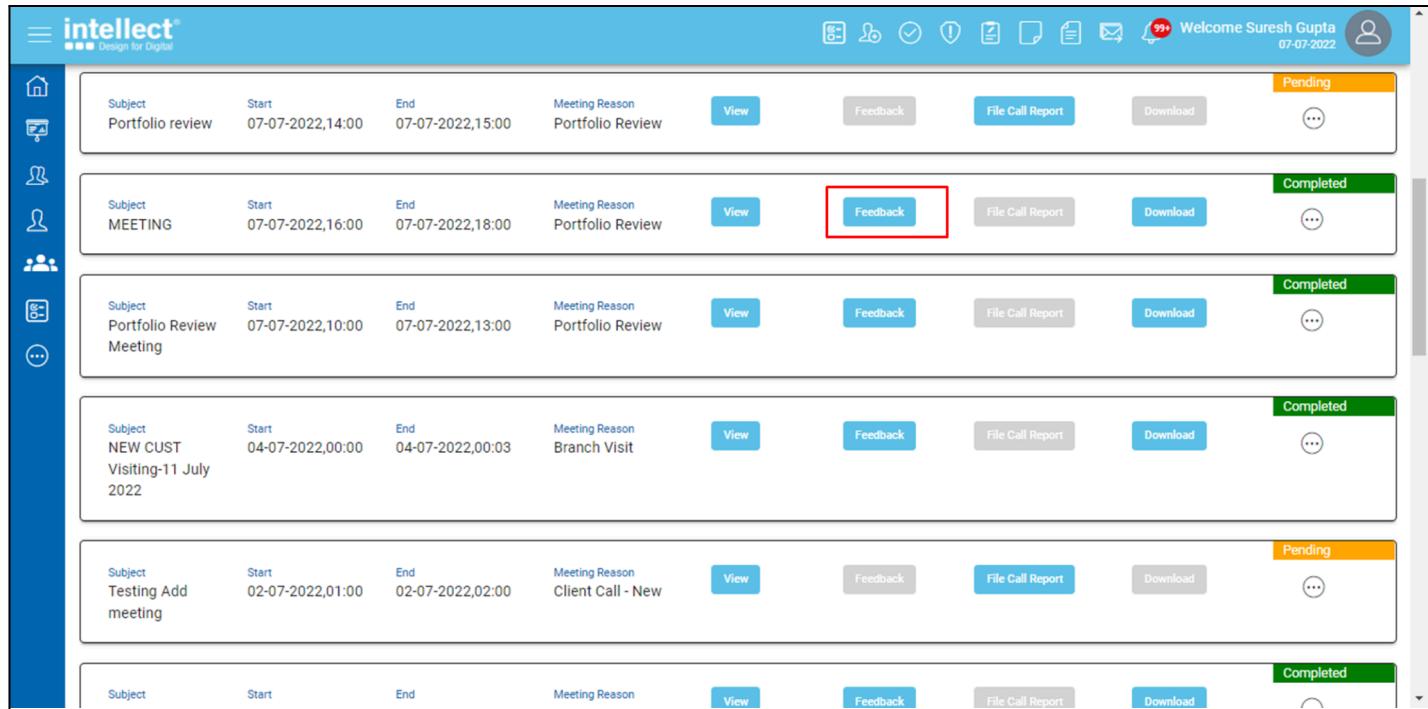
The supervisor can review the call report submitted by the RM and record his feedback from two paths:

- 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)

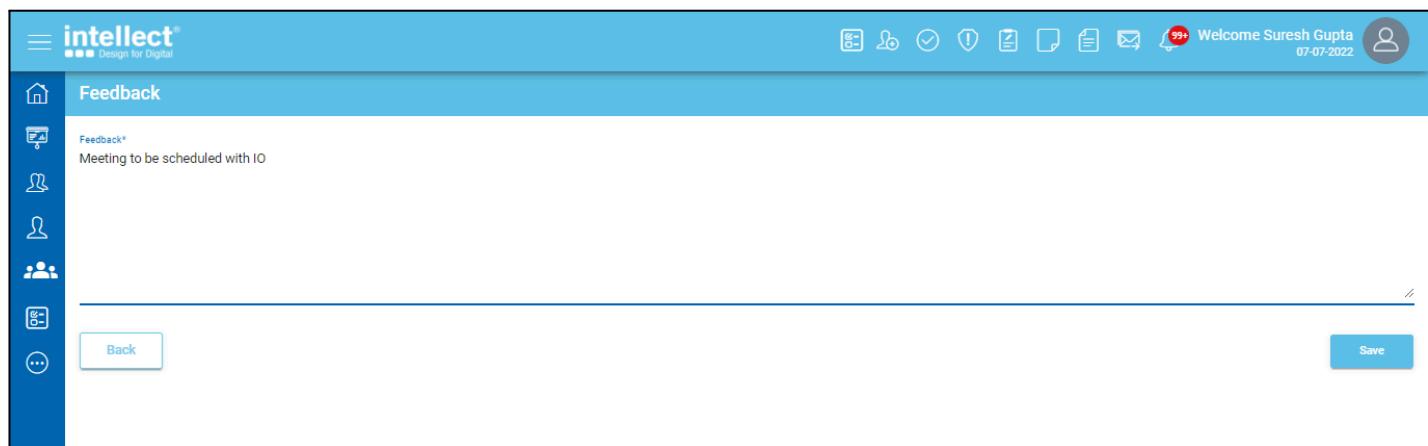


The screenshot shows a list of six meetings in the Intellect software. The meetings are:

- Subject: Portfolio review, Start: 07-07-2022,14:00, End: 07-07-2022,15:00, Meeting Reason: Portfolio Review. Status: Pending.
- Subject: MEETING, Start: 07-07-2022,16:00, End: 07-07-2022,18:00, Meeting Reason: Portfolio Review. Status: Completed. The 'Feedback' button is highlighted with a red box.
- Subject: Portfolio Review Meeting, Start: 07-07-2022,10:00, End: 07-07-2022,13:00, Meeting Reason: Portfolio Review. Status: Completed.
- Subject: NEW CUST Visiting-11 July 2022, Start: 04-07-2022,00:00, End: 04-07-2022,00:03, Meeting Reason: Branch Visit. Status: Completed.
- Subject: Testing Add meeting, Start: 02-07-2022,01:00, End: 02-07-2022,02:00, Meeting Reason: Client Call - New. Status: Pending.
- Subject: (empty), Start: (empty), End: (empty), Meeting Reason: (empty). Status: Completed.

Screen: Navigate to Feedback (Calendar)

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



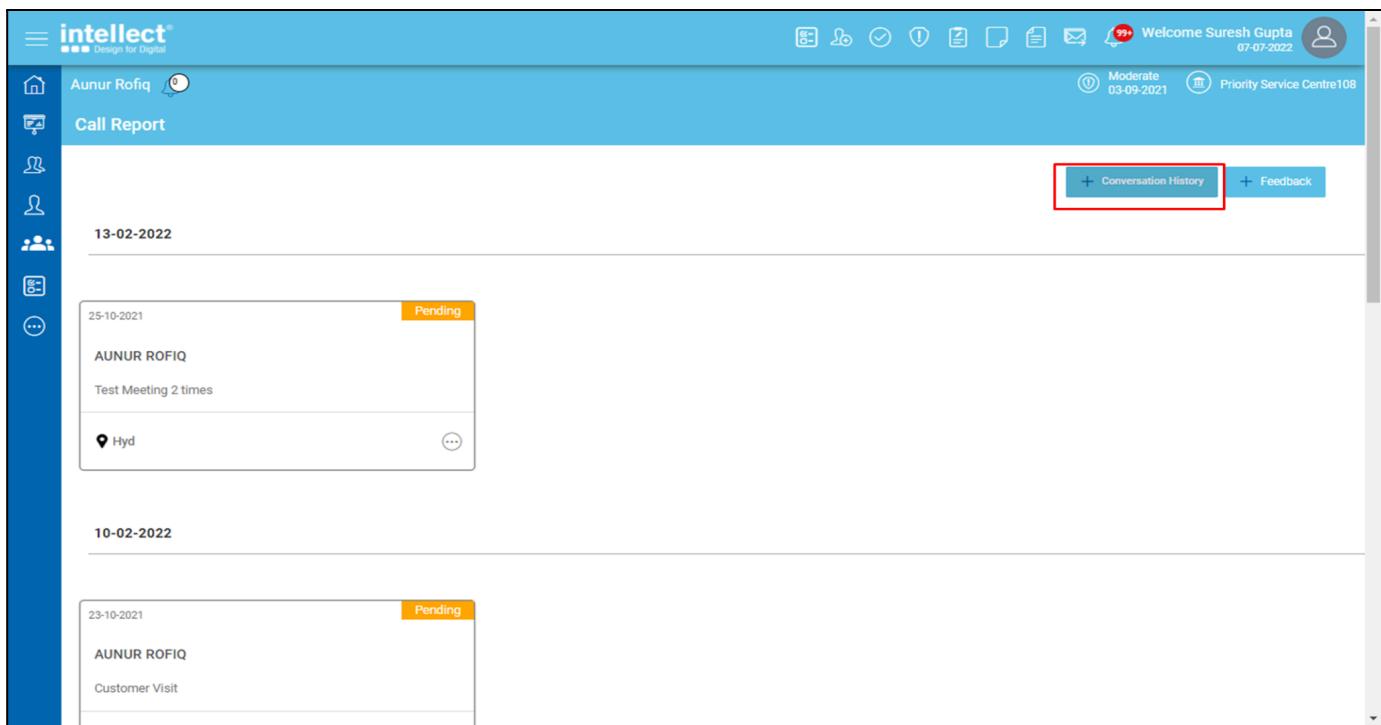
The screenshot shows the 'Feedback' screen in the Intellect software. The 'Feedback' tab is selected. A note is displayed: "Meeting to be scheduled with IO". At the bottom, there are two buttons: "Back" and "Save".

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

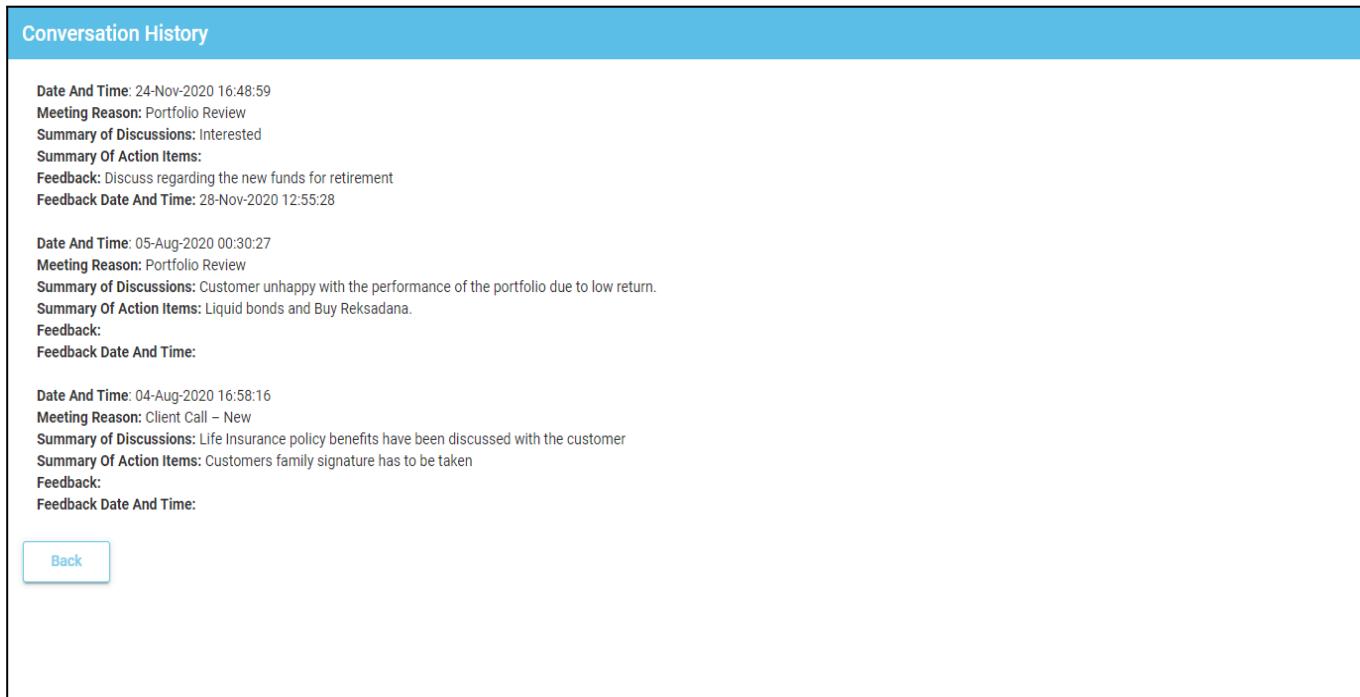
1. The User clicks on “Conversation History” tab



The screenshot shows a software interface for 'intellect Design for Digital'. At the top, there's a navigation bar with icons for home, user profile (Aunur Rofiq), and various service options. The main title is 'Call Report' under 'Aunur Rofiq'. On the right, there are status indicators for 'Moderate' (03-09-2021) and 'Priority Service Centre108'. Below the title, the date '13-02-2022' is shown. In the center, there are two call history entries. The first entry is for '25-10-2021' with 'AUNUR ROFIQ' and the note 'Test Meeting 2 times'. The second entry is for '10-02-2022' with 'AUNUR ROFIQ' and the note 'Customer Visit'. At the bottom right of the main area, there are two buttons: '+ Conversation History' (highlighted with a red box) and '+ Feedback'.

Screen: Navigate to Conversation History

2. The User can view the Conversation History details



Conversation History

Date And Time: 24-Nov-2020 16:48:59
Meeting Reason: Portfolio Review
Summary of Discussions: Interested
Summary Of Action Items:
Feedback: Discuss regarding the new funds for retirement
Feedback Date And Time: 28-Nov-2020 12:55:28

Date And Time: 05-Aug-2020 00:30:27
Meeting Reason: Portfolio Review
Summary of Discussions: Customer unhappy with the performance of the portfolio due to low return.
Summary Of Action Items: Liquid bonds and Buy Reksadana.
Feedback:
Feedback Date And Time:

Date And Time: 04-Aug-2020 16:58:16
Meeting Reason: Client Call – New
Summary of Discussions: Life Insurance policy benefits have been discussed with the customer
Summary Of Action Items: Customers family signature has to be taken
Feedback:
Feedback Date And Time:

[Back](#)

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/Clien/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	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	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/Clien/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	
SN o	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

SI 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