Functional Specification Document

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United Overseas Bank

Sales Force Automation

Regional BizConnect Programme, Phase 2

Business Banking

Functional Speicifcations Document

V1.0

3rd December 2018

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Leads

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1 OVERVIEW

1.1 Background

UOB Business Banking is enhancing its Sales and Service Model by automating key processes: Leads and Sales Management, Lending, Liabilities and Customer 360 view consolidated in the BRM sales tool.

Objectives

The implementation objective will focus on enhancing Leads Management capability in BRM. Customers can go online to apply for CASA Account Opening (Liabilities), Lending products (Lending) and other products (e.g. FX, Trade) through PWeb, by either using a Call-Back Form or authenticating through MyInfo CorpPass. This PWeb application workflow will be integrated with BRM, where Leads will be captured and followed through in BRM till closure. Tracking of Leads coming from PWeb has the following objectives:

- **Information consolidation**
    - Establish a centralized platform/view for Leads tracking initiated online and offline, as well as from campaigns
- **Enhance Prospecting Decisions**
    - RM/BET Team may refer to the Leads Management View on BRM to provide accurate Needs Analysis based on UOB offered products and manage the end-to-end prospecting experience.
- **Improve Sales management**
    - Having a single Leads tracking platform would expose RM to more cross-selling opportunities and increase sales.

1.2 Scope

Channels: PWeb online platform, MyInfoBiz and Call-Back Form sources. Our scope will also include Interactive Brochure, which serves as an optional form for the customer embedded in PWeb online.[1]

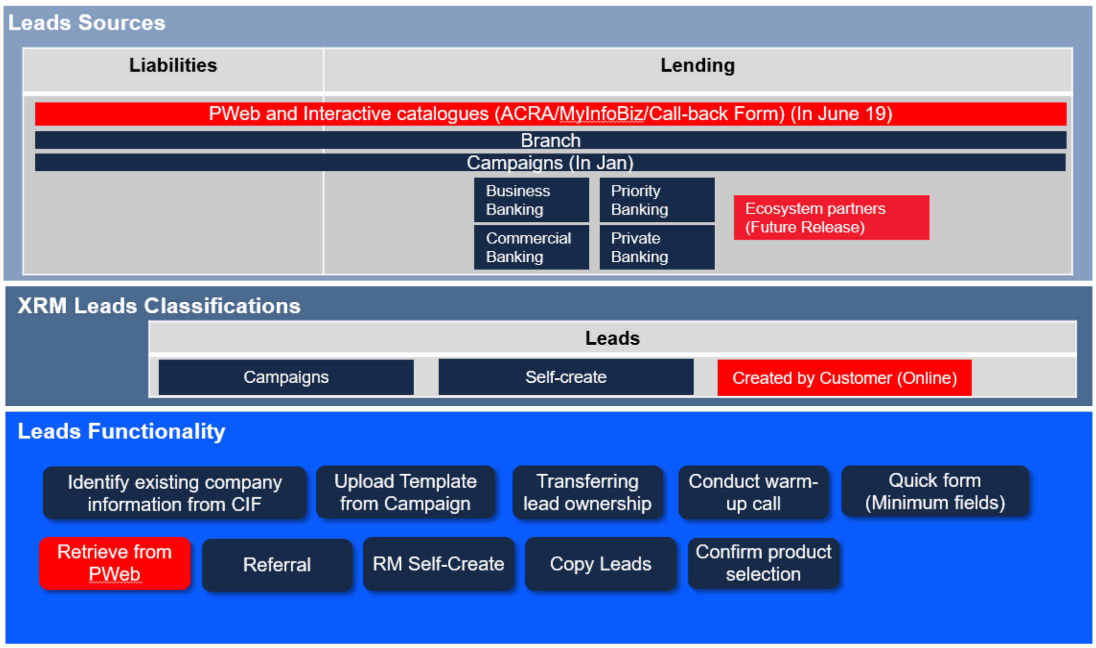
Countries: Singapore

Products: All Business Banking products, with a particular focus on Lending and Liabilities

Functionality: As per the diagramme below

UX/UI: Transition to Microsoft Dynamics Version 9, with a transition to the new information architecture and look and feel, including the consolidation of the "Quick Form" into the overall standardised Leads form.

[1] API must be able to support BizApp on the online channel.



Legend:

- Boxes highlighted in dark blue pertain to existing functionality/features
- Boxes highlighted in red pertain to new proposed functionality/features

Note: BRM is expected to accommodate Leads coming from other sources than PWeb. (i.e Self-created, Campaign Upload), and include leads coming from eco-system partners available in the future.

The scope for this release includes the following:

Type	Functionality/Features	Description
Leads source	PWeb online (MyInfoBiz/Call-Back Form) (In June 19)	We will focus on 2 scenarios: - PWeb online with Customer flow through Integrated Interactive Brochure - PWeb online without going through Interactive Brochure flow Subsequent online channels will cover: 1. PWeb Call-Back Form 2. PWeb via MyInfoBiz

	Ecosystem partners (Future Release)	Ecosystem partners (i.e Accessing embedded PWeb services from Lazada website) to be considered for future release.
Leads Functionality	Retrieve from PWeb	Retrieving information from PWeb and formulate into a Lead in BRM.

Note:

The enhancements in the upcoming release are expected to retain the Existing Leads status definitions at every juncture of the Leads Management Process, namely:

1. **New** – Newly initiated Leads from channel/source. If Lead status remains as New after 30 days, the Lead status changes into "Lost" with reason as "Expired".
2. **WIP** – Leads that are Work in Progress (WIP) requires further attention from the respective teams. (RM/BET Team) If Lead status remains as WIP after 90 days, the Lead status changes into "Lost" with reason as "Overdue".
3. **Won** – Leads status transitions into "Won" if an application is initiated via the application initiated button by the user. Alternatively, for online application from MyInfoBiz, Leads will transition into "Won" automatically.
4. **Lost** – If Customer abandons their interest, user clicks on the "Lost" button; Leads is changed to "Lost".

XRM roles for this release:

	RM Sales		RMTL Sales**		BET		Branch RM		Branch RMTL		CMOC (Ops)		COPC (Ops)		Compliance (KYC)		Contact Center	
	• Desktop • Tablet • Mobile*		• Desktop • Tablet • Mobile*		• Desktop		• Desktop • Tablet		• Desktop • Tablet		• Desktop		• Desktop		N/A		N/A	
	Read only	Edit	Read only	Edit	Read only	Edit	Read only	Edit	Read only	Edit	Read only	Edit	Read only	Edit	Read only	Edit	Read only	Edit
Sales Dashboard	-	✔	-	✔	-	✔	-	✔	-	✔								
Leads - Lending	-	✔	-	✔	-	✔	-	✔	-	✔	-	-	-	-	-	-	-	-
Leads - Liabilities	-	✔	-	✔	-	✔	-	✔	-	✔	-	-	-	-	-	-	-	-
Leads – Other products	-	✔	-	✔	-	✔	-	✔	-	✔	-	-	-	-	-	-	-	-

Out of scope

***Note:** Mobile mode is available as per the current capability

**** Note:** RMTL sales role view also includes Head of Sales BB and District Manager BB roles

1.3 Out of Scope for This Release

The Campaign upload channel, self-create channel, channels from Ecosystem Partners and workflow for Malaysia and Thailand (outside of Singapore) is not in scope for this release. Existing Leads functionalities will function as it is with the UI/UX changes detailed in this document.

Application management in BRM is out of scope for Leads, however, references to Application level fields and status are made throughout this document in order to clarify the boundaries, and are for reference purpose only.

1.4 Assumptions and Constraints

No.	Dependencies / Constraints	Proposed solution
1	Hiding the Microsoft infographic logo in Leads.	It's an extended feature in Office 365 product family (eg. Outlook Web, Teams, SharePoint, Delve, etc), which cannot be removed in Leads in the tablet mode using supported methods.
2	BRM will not be able to identify if the customer flowing from the PWeb call-back channel is an ETB. Further engagements is required. Solutioning needs to be scalable for such future proofing.	CIF Number should be a lookup value. However, if it is a lookup value, only company entity can be retrieved.
3	Key Information, Needs Analysis and Call Back Notes sections information will flow into the customer 360. IN addition, Notes section will be pulled from Customer 360 and vice versa.	Customer 360 design will be updated only in the upcoming releases, as such information flow from leads will not be enabled until then. Regardless of which Leads the notes and activities comes from, these information will be appended into the notes and activities respectively on customer 360. From a business standpoint, users can directly go into the customer 360 to have an overview of the customer (Buying habit, interaction behaviour etc)
4	If Lead is closed - Lost and the customer is NTB, key information and reason for loss to be stored under Prospect in Customer 360.	Prospect screens and capability to be designed in Customer 360 in subsequent releases.

5	Sections and parts of text collapsing and expanding (v8.2 feature)	Not available on UCI (Unified UIUX view). In-section side scroll is recommended instead.

1.5 References

The Interactive Brochure Matrix, PWeb Call-Back Form and Product and Services Mapping will be attached with this FSD for reference.

1.6 Glossary of Terms

Identify any terms and acronyms used within this document

Term/Acronym	Definition
BRM	Business Banking Relationship Management Application (also known as XRM)
NTB	New to Bank
ETB	Existing to Bank
RM	Relationship Manager
RMTL	Relationship Manager Team Lead
WIP	Work in Progress
CIF	Customer Information File
BWCIF	Bank Wide Customer Information Files
PWeb	Public Website
RTM	Requirements Traceability Matrix
BRD	Business Requirement Document
FSD	Functional Specification Document
MyInfoBiz	CorpPass
Prospect	A potential customer of the bank, not yet a customer
Customer	In this document refers to both Exsting and Potential customers

2 BUSINESS PROCESS

2.1 Overview of Leads

Lead provides an overview of a Prospect's interest in the bank's products or services - from identifying their interest to initiating an application on behalf of them. A lead does not intend to provide a holistic overview of existing customer's assets, history of activity and product held, however, it refers to C360 capability in BRM for ETB customer information, wallet sizing and BWCIF number.

The following Guiding Principles apply to leads capability:

#	Guiding principle
1	Based on the existing offline BRM Leads functionality
2	Version 9 will drive the information structure re-factoring and the change in the look and feel, however, the next release will add-on but will not change the existing functionality
3	The Lead page is consistent across channels and products – e.g. PWeb Lead information is integrated in the overall, generic Lead form, not a separate form
4	Minimum number of fields determines what is in the "Lead" page. In addition, there is an expanded section which accommodates additional questions, transferred from the Interactive Brochure on PWeb and logged into a Needs Analysis section, but not part of Application Form
5	Minimum information from Myinfobiz captured at the time of a Lead creation will automatically feed into the Lead as well as the application form
6	Lead page/functionality is not a process flow of its own
7	A physical Leads records is created, which is available and accessible from the Leads section
8	Lead generation sources should be displayed in the Lead page and be visible in the application form
9	Lead status is consistent across Lending and Liabilities flows, however its status may vary, depending on the source
10	Auto-won Leads coming from PWeb will be searchable and accessible in BRM, in case an Customer contacts the bank whilst still on the PWeb journey
11	Verified information (pulled from MyinfoBiz) at the time of the Lead creation, cannot be edited, except for Contact Information (Name, Phone and Email); and needs to be stored at the Application level
12	Each Lead is only tagged to a single primary product. However, the Leads could have multiple recommended products (Up to 3 secondary products).

2.2 Existing Leads and Application States in BRM[2]

In this section, a list of definitions is provided for each Lead status and its corresponding Application status. The application primary status and sub-status are mentioned in order to:

1. Illustrate the relationship between Leads and Applications
2. Identify key rules for transitioning from a Lead into an Application
3. Provide an overview of the scenarios and corresponding application status. Further explanations will be introduced in the Lending and Liability FSD.

Leads Status

Status	Source	Scenario	Liabilities	Assigned to	Lending	Assigned to
Leads – New	PWeb – Call-Back Form	When an Customer submits a Call-Back Form sucessfully. The lead status will be "Leads – New"	Yes	If Customer completed the first screen, Leads will be created and assigned to the BET Team/Area Manager If Customer completed the second screen, assigned to nearest branch district based on the Customer's first 2 digit postal code. If Customer completed the third screen, assigned to Customer's indicated preferred branch.	Yes	Assigned to BET team: When the "Referral by" field is empty in PWeb. Assigned to Sales team: When the "Referral by" field is a valid LAN ID.
Leads – WIP		When a user updates or creates an activity, the Lead stage transitions from "Leads – New" to "Leads - WIP". *Referral will change the Lead Status, however Assignment will not change the Lead status*	Yes	Current assigned user. If referred to branch user, ownership will be transferred the the respective user.	Yes	Current assigned user. If referred to RM, ownership will be transferred the the respective RM.

[2] For the purpose of this FSD, we are focusing on Leads. Please refer to Lending and Liability FSD for more details on the corresponding application statuses.

Leads – Won		After the engagements, the assigned user will initiate an application based on the outcome with Lead changed to won, else the user can also manually change the status.	Yes	Current assigned user	Yes	Current assigned user
Leads – Lost		When Customer does not wish to proceed with account opening process, Bank or Branch staff will change Lead from "Leads – WIP" to "Leads – Lost".	Yes	Current assigned user	Yes	Current assigned user
Leads - Won	PWeb-MyInfoBiz	Apply via MyinfoBiz online: After Customer gives PDPA consent on PWeb. A new Lead is created and auto-won. "Leads - New" to "Leads – Won"	Yes	System	Yes	System

Application Status (for reference)

Status	Source	Scenario	Liabilities	Assigned to	Lending	Assigned to
Open – Draft	PWeb	An application is first initiated manually (Call-back) or automatically (MyInfoBiz) in BRM via online PWeb.	Yes	Assigned to nearest branch district based on the Customer's first 2 digit postal code if application is initiated automatically by the system (MyInfoBiz) Assigned to the branch user who initiated the application (Call-Back Form)	Yes	Assigned to BET Team if application is initiated automatically by the system (MyInfoBiz) Assigned to the RM who initiated the application (Call-Back Form)

Note: Refer to Liability and Lending FSD for more information on the application statuses.

2.3 Overview of the Process for Leads

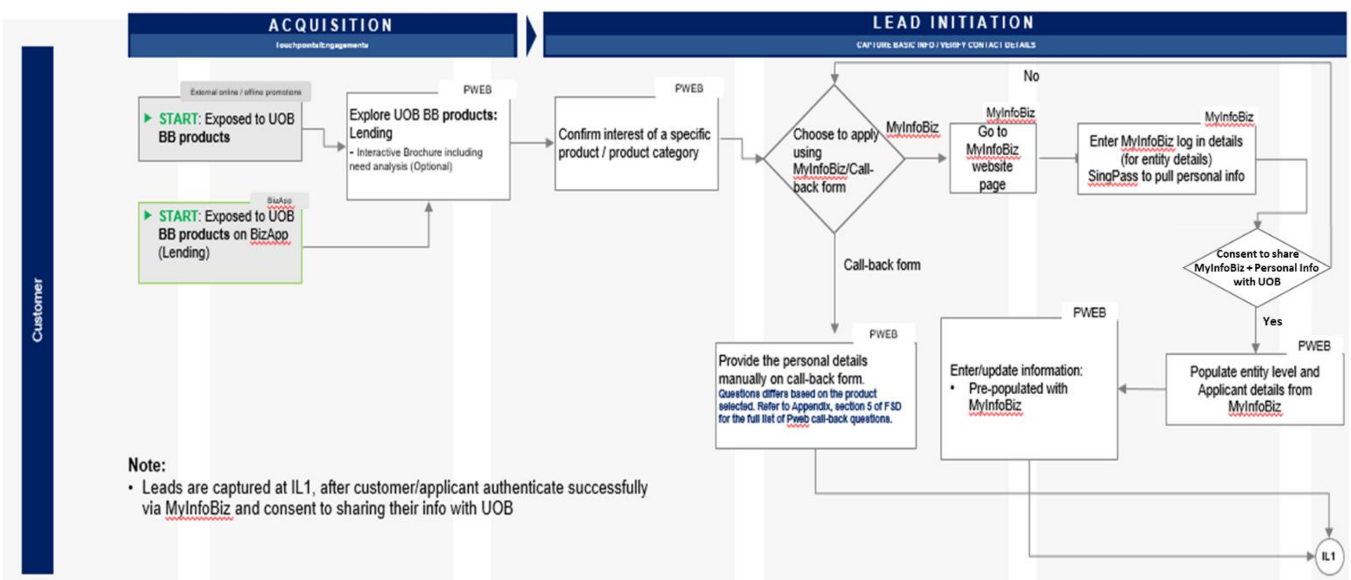
To enable a capture of leads generated on online channels, for example, PWeb with BizConnect for mainly **Lending** and **Liabilities** with the below objectives:

- Web team can build a web form to capture necessary Customer information online and submit data to BizConnect to create a new Lead.
- Web form will submit all necessary information which can include any of the following:
  - Fields found in the Leads screen, along with additional hidden values used for tracking and application fields population, coming from PWeb.
  - Lead assignment rule to auto-assign the Lead to the right team.[3]

2.4 Process flow for PWeb Online

Leads coming from PWeb into BRM will have 2 initiation sources:

1. PWeb Call-Back Form
2. PWeb MyInfoBiz



Context

Lead origination from PWeb Interactive Brochure:

Outside of the BRM Leads functionality, Customer will first show interest in applying for the UOB Business Banking Loan product. The Customer will be exposed to UOB business products, when they visit the UOB

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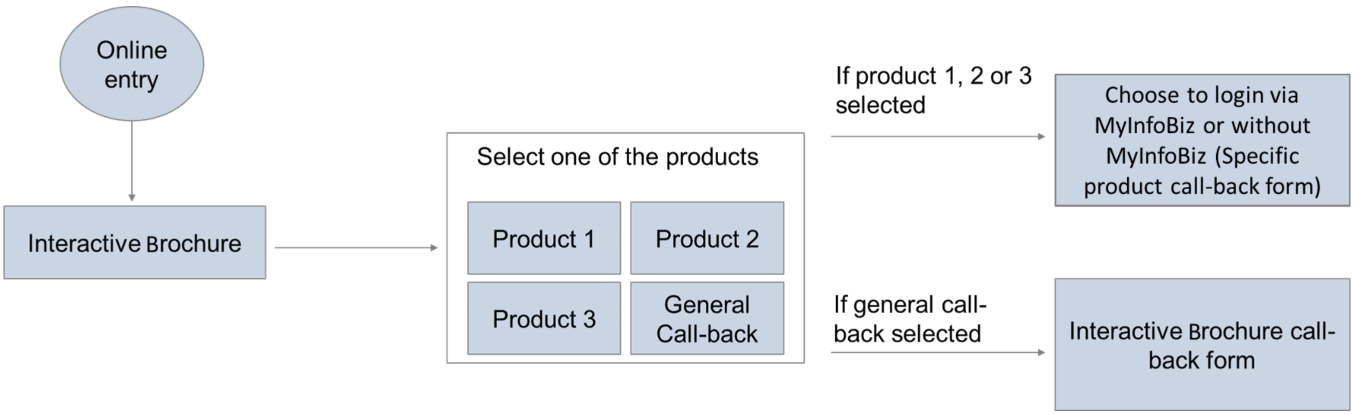
[3] Refer to section 2.2 (Lead Status Matrix)

website online via PWeb or BizApp. The Customer will then determine the product type they are interested in, by browsing through and responding to questions in the optional Interactive Brochure. Customer may skip the Interactive Brochure and proceed with the application on a specific product.

An expanded view of the Interactive Brochure is detailed below:



Upon entering into the Interactive Brochure, a series of questions will be provided to the Customer. [4]

Business Need	Questions
Growth and Expansion	- What is it for? - Years in Business - Latest Turnover
Transaction Savings	- Do you transact in foreign currencies? - How do you usually carry out your transactions? - What is your average account balance?
Allow me to Bank with ease	- Do you transact in foreign currencies? - Do you have standard payments or funds transfer every month - Do you transact with Debit/Credit Cards?

Based on the responses provided by the Customer, a list of recommended products will be generated (Up to 3), which will be registered in a lead.

[4] Refer to appendix for the list of questions in the interactive brochures.

Lead origination from PWeb Call-Back Form

2 scenarios for product choice:

1. If Customer selects any of the 3 indicated recommended product/services, he/she will be given the choice to either login via “MyInfoBiz” or “Without MyInfoBiz”. If Customer chooses not to login with MyInfoBiz, they will be directed to a Call-Back Form where additional questions will be displayed based on the product selected.
2. If Customer is unsure about the product to be selected, he/she may provide a neutral response via the General Call-Back selection. They will then be directed to a Call-Back Form where additional questions will be displayed based on the product selected.[5]

PWeb MyInfoBiz

If a Customer chooses to "Apply with MyInfo Business", they will be navigated to a PWeb form, which shows the selection for them to "Retrieve with MyInfo Business". When Customer clicks on this link, the Customer will be navigated to MyInfo CorpPass sign-in page. On MyInfo CorpPass sign-in page, the Customer will be prompted to log in to MyInfoBiz with their CorpPass credentials: UEN/Entity ID, CorpPass ID, Password.

Note: The Customer’s personal information will be retrieved from MyInfo, and Entity information will be retrieved from MyInfoBiz.

Upon successful login to MyInfoBiz using their CorpPass credentials, the Customer will be required to agree consenting to share their MyInfoBiz information as well as their personal information with UOB. If they do not consent, they will not be able to proceed with the account opening process.

For Lending Leads, 2 Customer consents are required for the PWeb MyInfoBiz (Govtech) flow:

1. PDPA consent
2. CBS consent

Upon getting the Customer consent to share their MyInfoBiz and personal information, PWeb will retrieve all the consented data from MyInfo Biz and MyInfo, and populates the data into PWeb form. The fields that are retrieved from MyInfoBiz and displayed on PWeb form are as follows:

- Registered Company Name
- Registered Company No.
- Entity Type
- Customer’s Name
- Alias
- Mobile
- Email

Next, the Customer enters to update their information, pre-populated with MyInfoBiz on Pweb, and add the following information:

[5] Refer to appendix for the list of additional questions in the Call-Back Forms.

- Entity type
- Nature of business
- Company Turnover

Once the Customer clicks "Submit Application" on the Lending Pweb flow and "Save and Continue" on the Liabilities Pweb flow, initiated from MyInfobiz, a Lead will be created. If the Customer exits the application page half way, an email will be sent to the Customer with a unique reference number and a URL link to resume the application. The email will also inform them that this link is valid only for 7 working days.

2.5 Leads process for Both Liability and Lending Offline

The section includes:

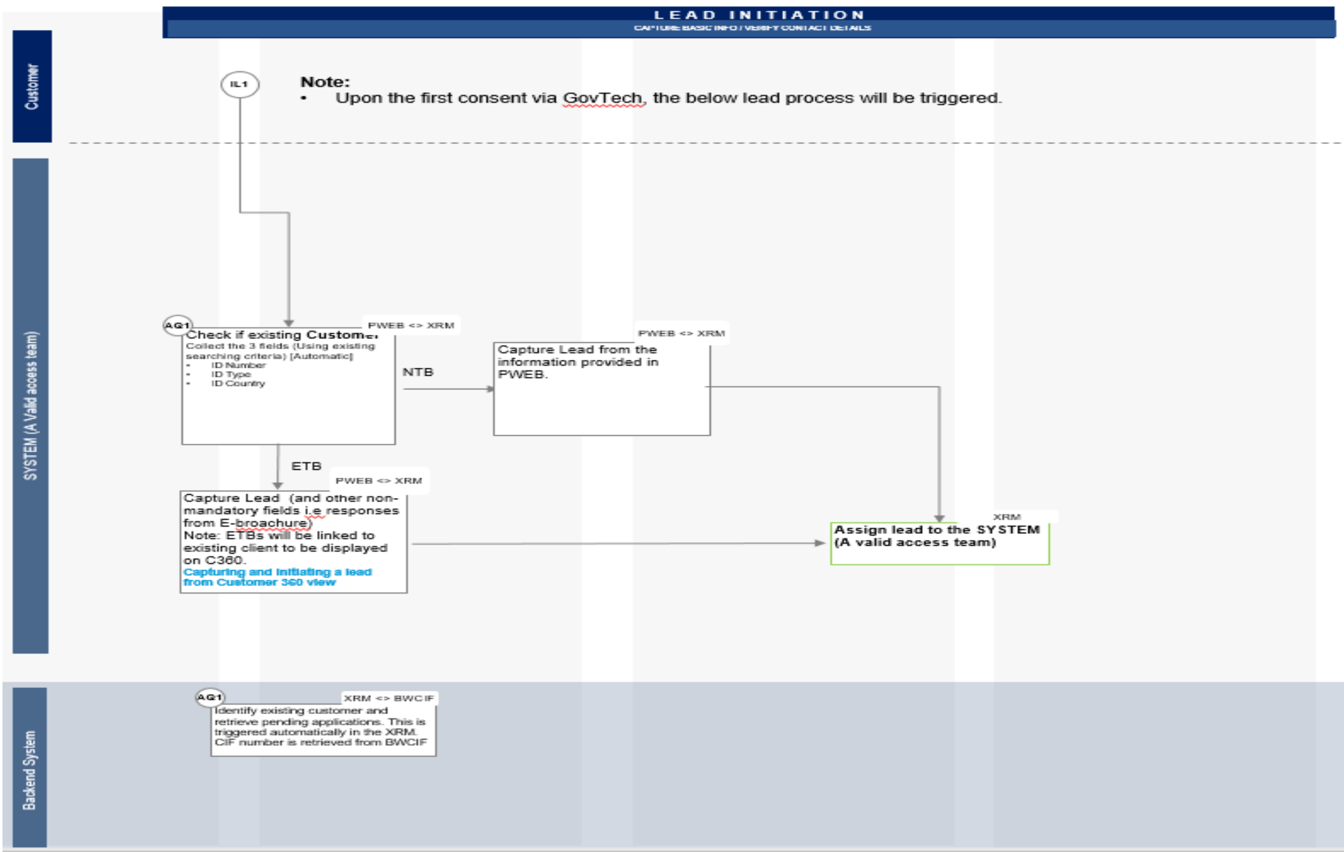
1. Leads Management Process flow for Liability and Lending Offline on BRM. (For this release, only Leads that are created via the online PWeb flow will be mentioned)
2. All exception flows will also be mentioned and included.
3. A list of functionalities and features will also be appended in this section.

Overview of Leads offline flow/process

The offline interactions and process flow in Leads differs based on 2 online scenario/channel:

1. MyInfoBiz
2. Call-Back Form

MyInfoBiz



For Leads source coming from MyInfoBiz, all existing customers are identified with:

- Customer ID Number
- ID Type
- Country ID,

before a Lead is initiated. This is done automatically by the system if the application is initiated online (i.e on PWeb) as depicted above. RM will initiate the Lead manually if the application is initiated offline (i.e By Campaign, upload batches or Customer walk-in to branch). After a Lead is initiated, it will be routed to the SYSTEM (A valid access team). Next, an application will be automatically created/initiated on BRM.

Call-Back Form

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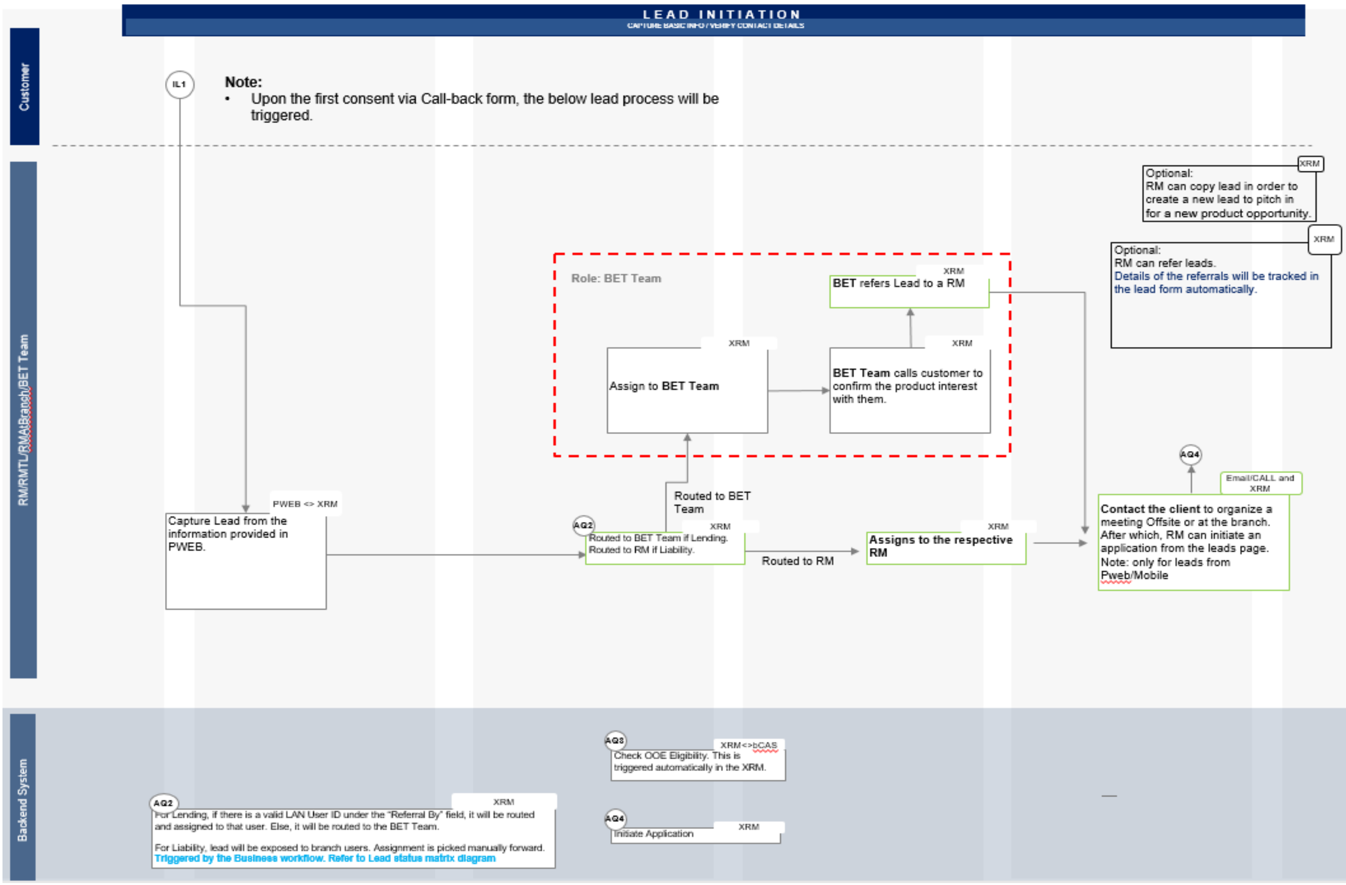


For Leads source initiated by the Call-Back Form, Leads will be captured and created automatically by the system. After a lead is initiated, it will be routed to a specific team (i.e BET Team/RM) based on the criteria defined in the Leads Status Matrix.[6]

For Lending, if there is a valid LAN User ID under the "Referral by" field, it will be routed and assigned to the indicated user. If no value is indicated under "referral by", it will be routed to the BET Team. The BET Team will engage the Customer, update the current Lead stage/status, (if applicable) and schedule an appointment with an RM, if necessary, before referring to the RM for further actions. The assigned RM will decide if an application should be initiated after a discussion with a Customer.

For Liability, Lead will be referred to Branch RMs. Assignment is done manually by the branch user. Branch RM will follow up on the lead with a face-to-face appointment, update the current leads status/stage (if applicable) and decide if an application should be initiated after a discussion with a Customer.

[6] Refer to the Leads Status Matrix under Section 2.3

If RM clicks on the "Lost" button, Lead is lost and its status automatically transitions into "Lost" status. If RM initiates an application by clicking a button on the Blue Action ribbon, the status changes to "Won" with its status transitions into "Leads – Won", else RM is able to change the status to "Leads – Won" by clicking on the "Won" button.

Exception flow

Besides the Lead processes depicted above, we have also identified 1 possible exceptional flows in Leads:

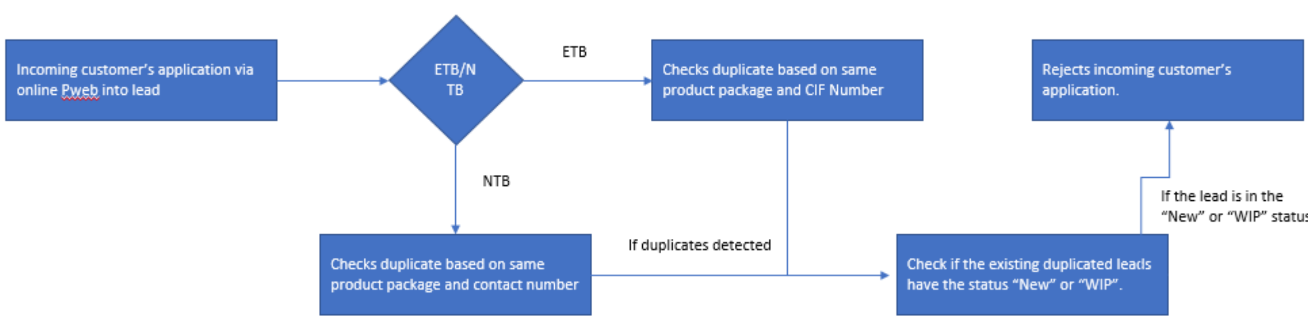
1. Duplicates handling case

Example scenario:
Customer A applied for Product A via the online PWeb Call-Back Form. After the Customer clicks "Save and Proceed", a Lead is created with the status "New". Over the next few days, the Lead Owner engages with Customer A but has not attained an agreement with the Customer on the formal initiation of an application. Even so, Customer A goes into the online PWeb and expresses his interest again on the same Product A. This would result in a duplicated online application/Leads created on BRM.

To avoid duplicated online applications/Leads, a series of criteria checks and mechanisms will be embedded in the online PWeb:

1. **If the Customer is New to Bank (NTB**), online PWeb will identify duplicates based on the product package selected and the Customer's contact number.
2. **If the Customer is Existing to Bank (ETB),** online PWeb will identify duplicates based on the CIF number and product package.

PWeb duplicate detection is done based on the following rules for both Lending and Liability:



All duplicate leads are passed to BRM. BRM should be able to identify duplicate leads and group and assign them together for processing.

Enhanced/Added Functionality and features

The folling new features and enhancements will be added as NEW under Leads in the upcoming BRM release.

Activities	Descriptions
E-WalletSizing	WalletSizing is to capture additional information from customer to know more about the customer regarding on-us / off-us products or financial information customer is having. User may access the WalletSizing link under the “Needs Analysis” section to access the Existing WalletSizing information under Customer 360.
Duplicate Lead	RM can copy Lead in order to create a new Lead to pitch-in for cross-selling opportunities. Click on the “Duplicate Lead” button located on the top bar to copy and create a duplicate Lead with all the following sections with lead status as ‘New’ for WIP, Lost, Won leads • Key information • Lead Status as ‘New’ • Campaigns (if Leads is created via the upload template (CSV file) (Existing behaviour which will only be displayed if uploaded via template upload) • Call-back notes (if there are any information) • Needs Analysis (if there are any information) • Activities – not include • Notes - not include • Additional Information – not include For ETB (Additional sections): • Contact information • Customer to Customer • Addressess Tracking Tab: • Referral Trail - not include **Note :** This ‘Duplicate Lead’ feature will only duplicate a lead, will not duplicate application if lead is already promoted to application
Additional information	To facilitate the BET Team/Sales Team (RM) engagement with the Customer, additional information will be captured and retrieved from the PWeb and displayed onto BRM. 1. Call-Back Form – Provides a 360 view of the list of questions and responses gathered from the Call-Back Form. A list of all recommended products and sevices from the Interactive Brochure will also be captured in this section. This allows RM to have better visibility and alignment with the Customers’ product interest. 2. Additional information – Section which reflects all product related information. 3. Needs Analysis – All customer self-declared information i.e Years in business, Annual Sales Turnover will be captured in this section. This information includes Customers’ responses to the Needs Analysis questions on Interactive Brochure. A link to the WalletSizing will be appended in this section.

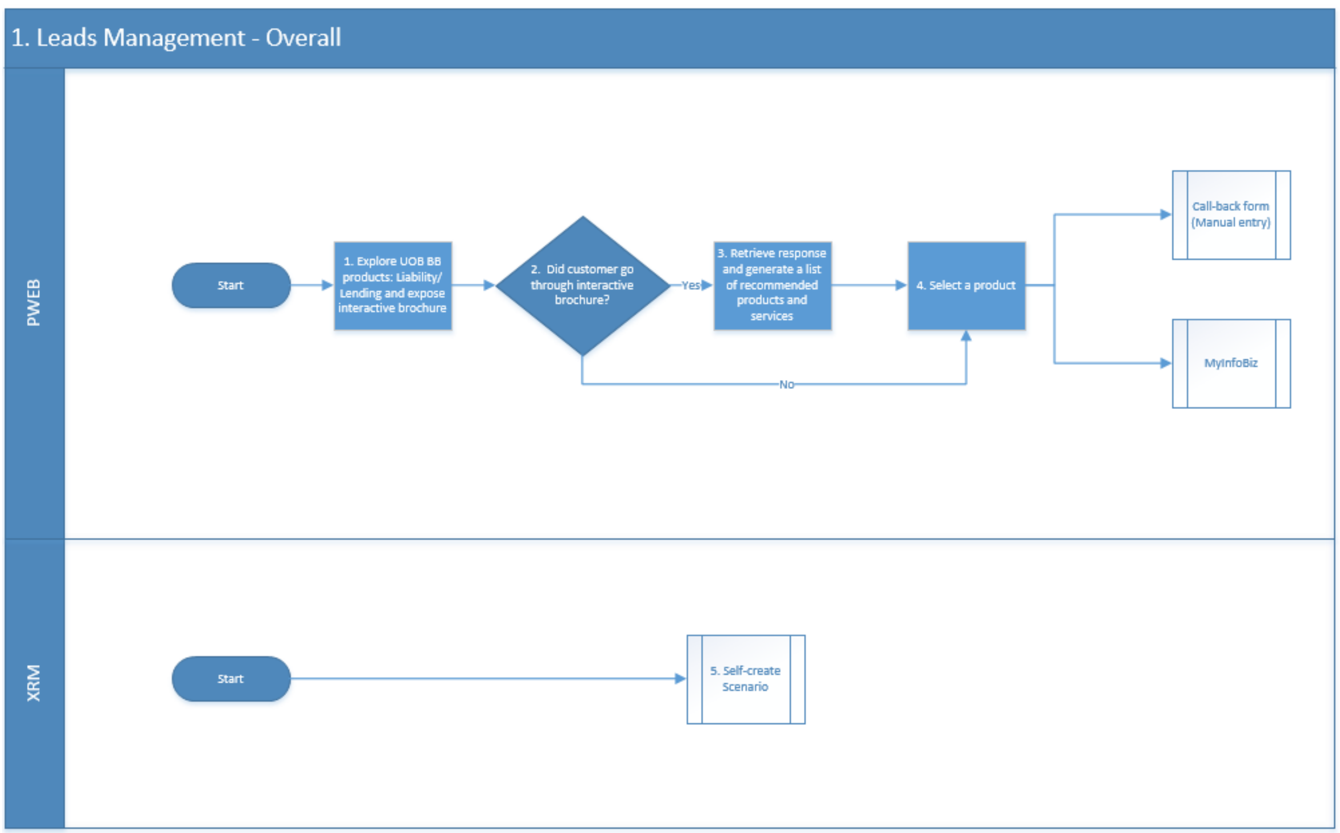
Acivities and Notes (Seperated)	The Activities and Notes section provides an avenue for BET Team/Sales Team to record all customer engagements. This would give them a clear visibility as well as a single source of truth for all past engagements so that they can conduct accurate assessments and analysis.

3 SYSTEM PROCESS FLOW

3.1 System Process Flow Diagram

This section details the system process flow diagram for Leads.

Overview



Step	System	System Description
1	**PWeb**	PWeb display a page with several product options and shows the Interactive Brochure link.

<table>
<tr><td>2</td><td>PWeb</td><td>If Customer decides to skip the Interactive Brochure, system shows a list of products and services available to Customer.
If the Customer opts to go through Interactive Brochure, it will prompt Customer with a list of questions.</td></tr>
<tr><td>3</td><td>PWeb</td><td>Intereactive Brochure will generate a list of recommended products and services (Up to 3) based on the responses provided by the Customer.
<table>
<tr><th>Sections</th><th>Questions</th></tr>
<tr><td>General</td><td>- What is your business need?
- What is your Nature of business?
- Do you have any existing loan facilities?</td></tr>
<tr><td>Growth and expansion (Response from “What us your business need?”)</td><td>- What is it for?
- Years in Business
- Latest Turnover</td></tr>
<tr><td>Transaction savings (Response from “What us your business need?”)</td><td>- Do you transact in foreign currencies?
- How do you usually carry out your transactions?
- What is your average account balance?</td></tr>
<tr><td>Allow me to bank with ease (Response from “What us your business need?”)</td><td>- Do you transact in foreign currencies?
- Do you have standard payments or funds transfer every month?
- Do you transact with Debit/Credit Cards?</td></tr>
</table></td></tr>
<tr><td>4 (Decision Point)</td><td>PWeb</td><td>PWeb display a page with three buttons indicating option to authenticate with either “MyInfo Biz” or direct to a Call-Back Form.
PWeb directs Customer to either MyInfo Biz or Call-Back Form flow depending on Customer selected choice of verification.</td></tr>
</table>

5 (Additional information as an existing flow)	**BRM**	This section will not be explained in details as it follows the As-Is flow.

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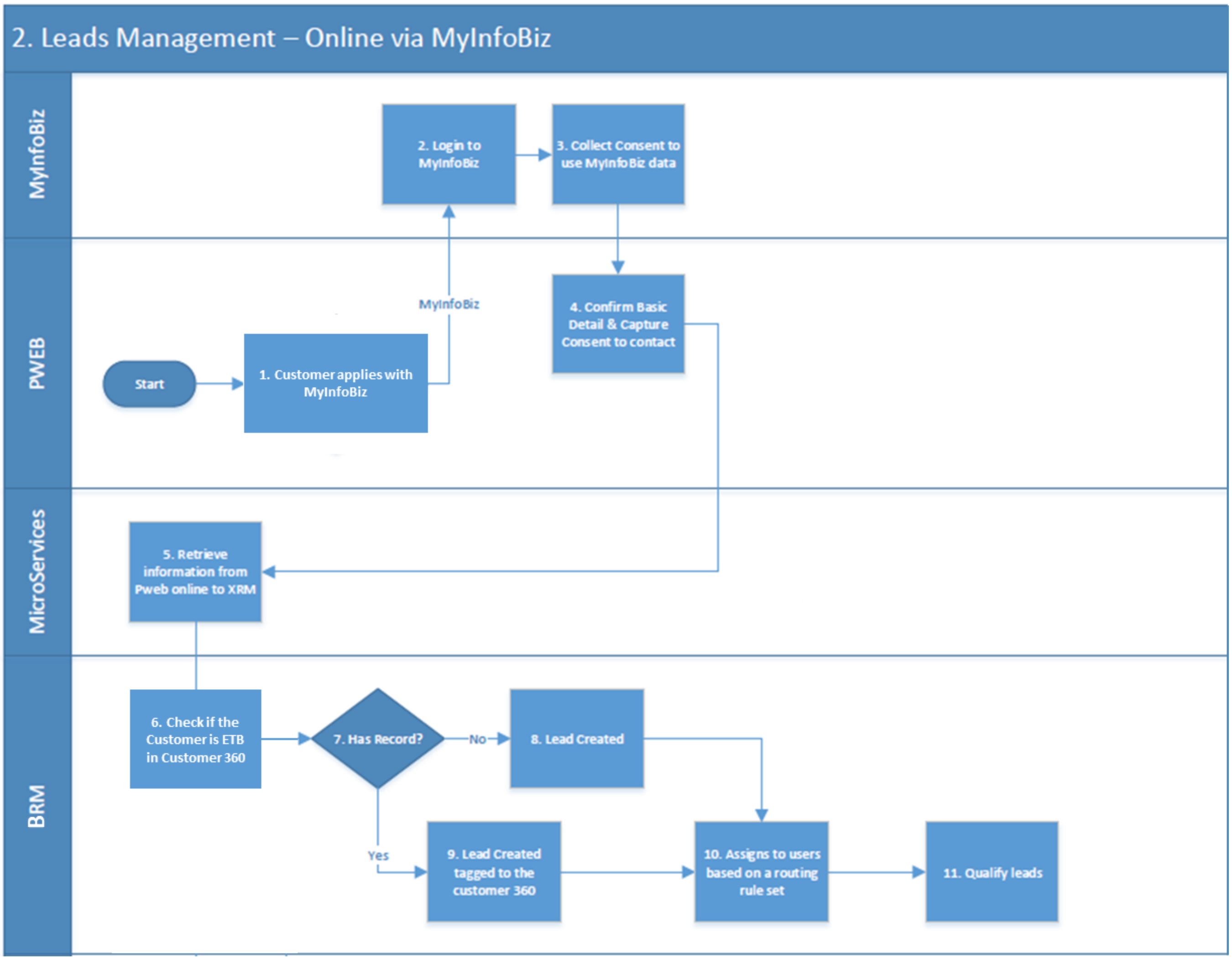
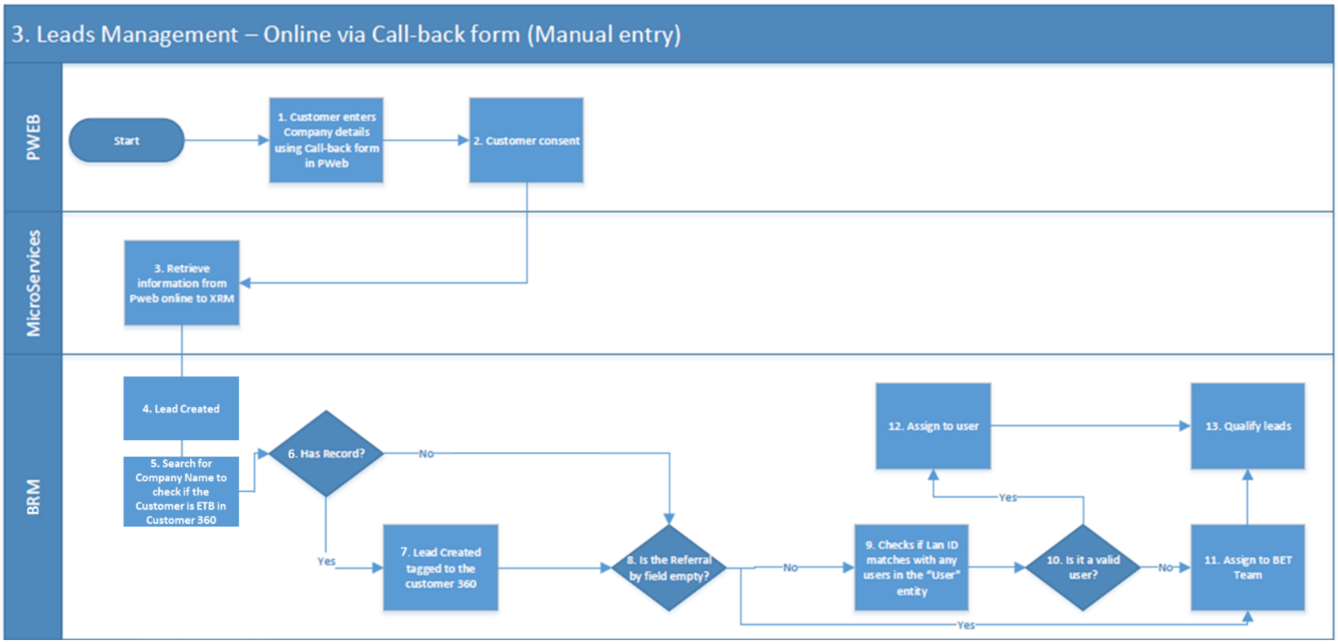
MyInfoBiz



Step	System	System Description
1	**PWeb**	The Customer opts to apply with “MyInfo Biz”
2	**MyInfo Biz**	PWeb redirects user to MyInfo CorpPass sign-in page (managed by external system) to sign in using CorpPass credential.

3	**MyInfo Biz**	Upon successful sign-in, MyInfo Biz page will display the consent form indicating the list of information that would be shared with UOB for opening an account online with UOB. Customer may click on “I Agree” button to permits UOB to retrieve data based on Terms of Use or click “No Thanks” button to cancel.
4	**PWeb**	System fetches the details from MyInfo Biz and display the information for Customer to review basic details. Customer will need to fill additional information: • Country of Operation • Nature of Business • Entity Sub Type Customer consent are given to the bank to collect and use the given contact details upon clicking “Next”.
5	**BRM**	API calls entity details from PWeb MyInfoBiz and transferred to BRM.
6	**Customer 360 (XRM)**	The system will search for existing customer using company ID (UEN). If it is an existing customer, a CIF No. will tag to the Lead and the section for “Addresses”, “Contact Info”, “Customer-to-Customer” will be displayed in BRM from BWCIF as soon as the Lead is created in point 9.
7 Check Point	**BRM**	If Customer has an existing to bank record, it is an ETB. Move on to point 9. If Customer does not have an existing to bank record, it is a NTB. Move on to point 8.
8	**BRM**	System creates a Lead record in BRM using the information gathered without a CIF number reflected as a NTB. Refer to section 4. Illustrations and Fields mapping.
9	**BRM**	System creates a Lead record in BRM using the information gathered with a CIF number reflected as an ETB. Refer to section 4. Illustrations and Fields mapping.
10	**BRM**	BRM routes and assigns the Lead to BET Team/RM. Refer to section 2.2 for the Leads status matrix.
11	**BRM**	BRM automatically change the Lead status to “Won” and automatically initiate the respective application.

Call-Back Form (Manual entry)



Step	System	System Description
1	**Call-Back Form**	PWeb Call-Back Form shows a list of fields for Customer input.
2	**Call-Back Form**	Customer may click on "I Agree" button to permits UOB to retrieve data based on Terms of Use or click "No Thanks" button to cancel.
3	**BRM**	API calls entity details from PWeb MyInfoBiz and transferred to BRM.
4	**BRM**	System creates a Lead record in Refer to section 4. Illustrations and Fields mapping.
5	**Customer 360 (XRM)**	The system will search for existing customer using company ID (UEN). If it is an existing customer, a CIF No. will tag to the Lead and the section for "Addresses", "Contact Info", "Customer-to-Customer" will be displayed in BRM from BWCIF.
6 Check Point	**BRM**	If Customer has an existing to bank record, it is an ETB. Move on to point 7. If Customer does not have an existing to bank record, it is a NTB. Move on to point 8.

Project Code :	Date Created :	File Name : BRM Regional BizConnect P2 – Leads - SG
Object ID : SA02	Date Printed :05 Dec 2018	Version : 1.1

7	**BRM**	System creates a Lead record in BRM using the information gathered with a CIF number reflected as a ETB. Refer to section 4. Illustrations and Fields mapping.
8 (Lending specific) **Check point**	**BRM**	BRM checks if the "Referred by" field is empty. If it is empty, proceed to 11, else proceed to 9.
9 (Lending specific)	**BRM**	BRM Business logic conducts a check by matching the "Referral by" field with the LAN ID in "User" entity in BRM.
10 (Lending specific) **Check point**	**BRM**	If it is a valid LAN ID/User, proceed to point 12, else proceed to point 11
11 (Lending specific)	**BRM**	BRM routes and assigns the Lead to the BET Team.
12	**BRM**	For Lending, BRM routes and assigns the Lead to the user indicated in the "Referral by" field grabbed from online PWeb. For Liability, BRM will route to users according to the below scenarios: 1.If Customer completed the first screen, route to the BET Team. 2.If Customer completed the second screen, route to nearest branch district from Customer's first 2 digit postal code. 3.If Customer completed the third screen, route to Customer's indicated preferred branch.
13	**BRM**	BRM will change the Leads to "Won" if user clicks on "Initiate Application". BRM will change the Leads to "Lost" if user clicks on the "Lost" button.

4 ILLUSTRATIONS AND FIELDS MAPPING

This section covers Illustrations of the leads design with corresponding fields mapped.

The Lead form consists of 2 tabs: Information and Tracking. To define a clear boundary between these functions:

- "Information" tab covers all information pertaining to the Customer. (Including Customer responses from PWeb, where applicable).
- "Tracking" tab contains secondary sections for checking and audit purpose.

The table below lists the Leads Form sections divided across the 2 tabs on BRM (Structured in a sequential order from top to bottom):

Tab	Sections	Generated source	Descriptions
Information Tracking	Key information	System generated/self create	Shows information and details relating to the Customer and company entity. This section provides the baseline when RM creates a new Lead on BRM.
	Leads Status Update	Completed by user	Update additional status pertaining to the Leads.
	Campaigns	System Generated via upload template	This section keeps track of the Campaign Information based on the records inserted in the upload templates. Only appears if Leads are created via an upload template into BRM.
	Call-back notes	Call-Back Form and Interactive Brochure's recommended product information from PWeb	This section provides a 360 view on the list of questions and responses gathered from the Call-Back Form. A list of all recommended products and sevices from the Interactive Brochure will also be captured in this section. This allow the RM to have a better visibility and alignment with the Customers' product interest.
	Needs Analysis	Responses from Interactive Brochure and additional information from Call-Back Form	All Customer self declared information (i.e Years in business, Annual Sales Turnover) will be captured in this section. These information includes Customers' responses to the Needs Analysis on Interactive Brochure. Users may also navigate to the E-WalletSizing manual via the link on screen.
	Activities	Completed by user	Further activities and follow-ups by the respective teams will be tracked under Activities.

	Notes	Completed by user	User (RM/BET Team) may insert any Customer related engagements/feedbacks into this section. This would provide clear visibility and insights to the referred user.
	Additional Information	Completed by user	This section provides an avenue for users to insert additional information/comments pertaining to the Customer.
	Addresses	Retrived from BWCIF	These sections will be populated into the Leads form once CIF number is retrieved from BWCIF. This would happen only if the Customer is identified as an Existing to Bank (ETB).
	Contact Info	Retrived from BWCIF	
	Customer-to-Customer	Retrived from BWCIF	
Tracking	Referral Trail	System generated	All past referrals will be tracked under the Referral Trail section
	Lead Tracking	System generated	This section provides an overview of the Lead assignment.

4.1.1 General Functions

General navigational functions are detailed below.

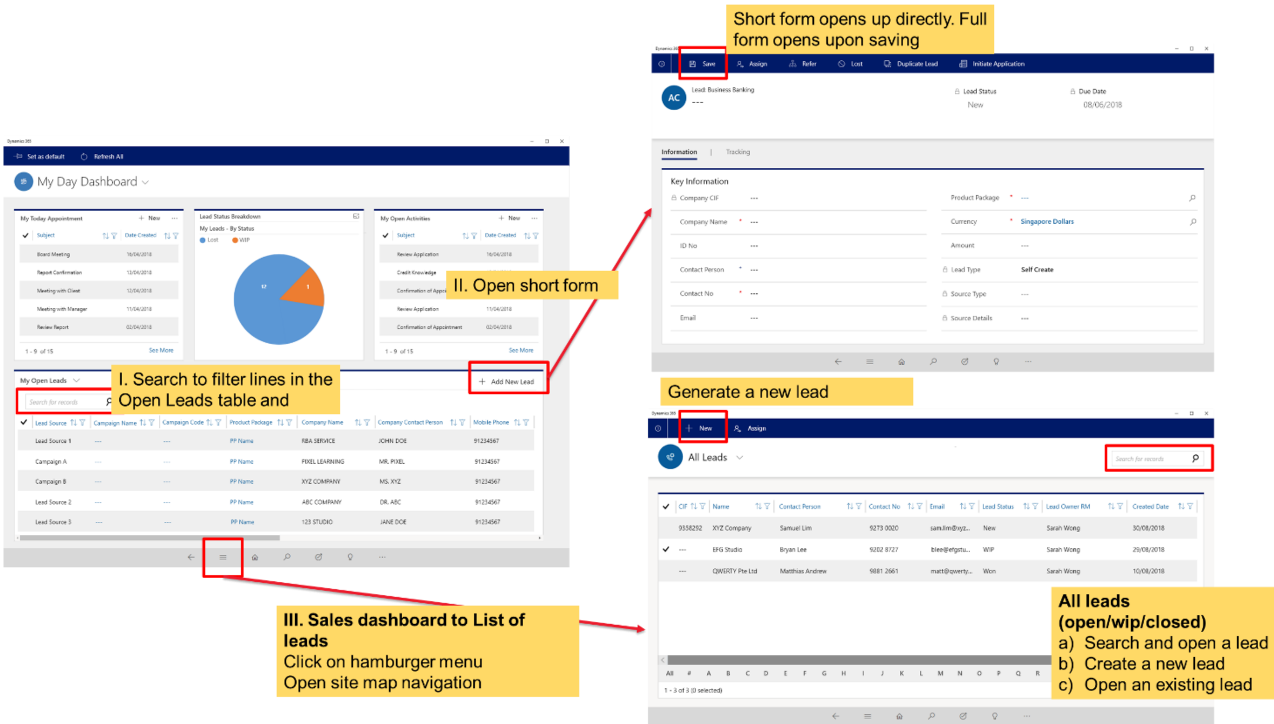
1. Sorting - All columns in the tables are sortable. This is indicated by ↑↓ .
2. Filtering – All columns in the tables can be filtered. This is indicated by .

This section contains screen Illustrations for Leads design.

4.1.2 Point of Entries

There are 2 point of entries:

1. Dashboard
2. List of Leads

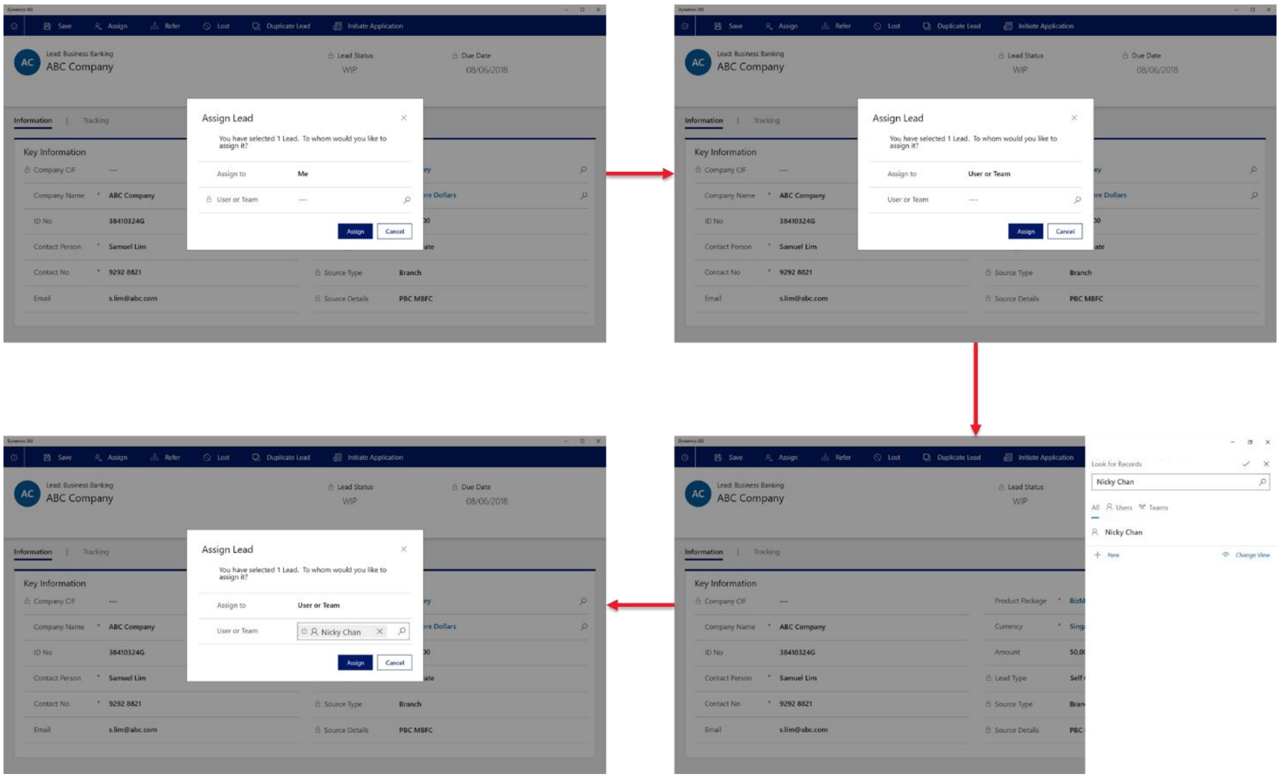


Dashboard

1. **Search and filter** - From the dashboard, users may use the search box to narrow down their searches and filter the Open Leads table results.
2. **Add a new Lead** - Users may add a new lead via the + Add New Lead button located at the top right of the dashboard. Upon clicking on new Lead, BRM directs user to a Leads form with the basic fields required for user to enter (Short form). Upon saving, rest of the sections will be populated. (Expanded form consisting of Key information, Leads status update, activities, notes, additional information)
3. **Directing to List of Leads** – Users may click on the hamburger menu located at the bottom of the screen to access the list of Leads screen.

List of Leads Page

1. **Add a new Lead** - Users may add a new lead via the + New button located on the top navigation bar. Upon clicking on the button, BRM directs user to a Leads form with the basic fields required for user to enter (Short form). Upon saving, rest of the sections will be populated. (Expanded form consisting of Key information, Leads status update, activities, notes, additional information))
2. **Assign a lead** – From the list of leads, user may select the Assign button located on the top bar to assign lead.



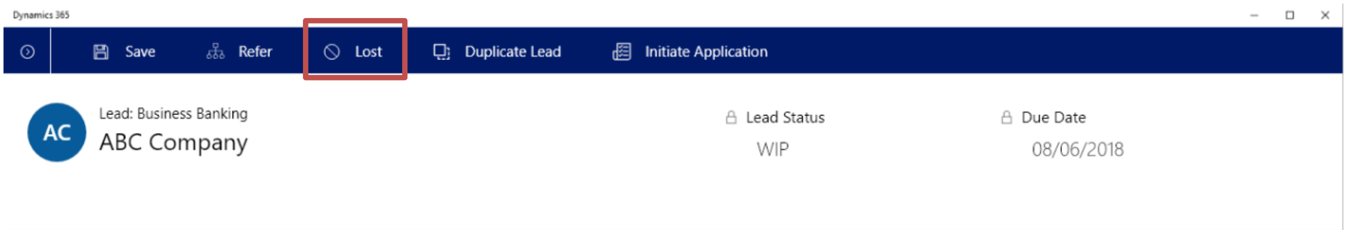
3. **Search and filter** - From the List of Leads screens, users may use the search box to narrow down their searches and filter the Leads table (open/wip/closed) results; Users may open a lead directly from the leads table.

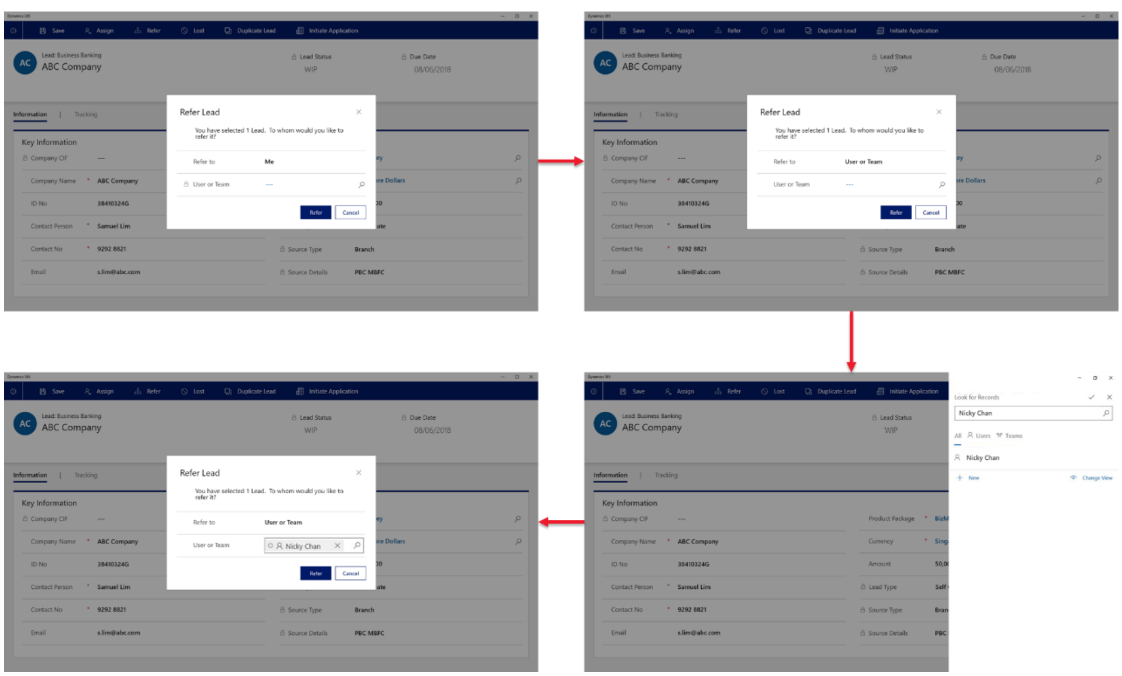
4.1.3 Leads Form

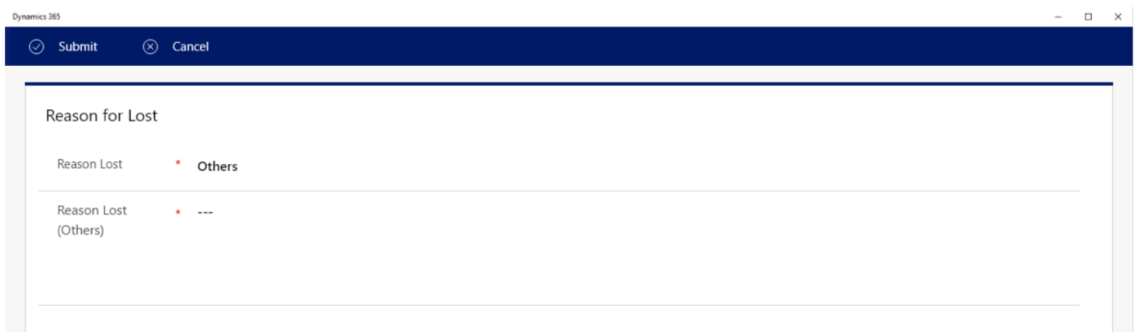
- **Top Navigational bar**

Sticky header, which allows users to access the key action buttons and important information on screen easily by scrolling down the form.

For the purpose of this release, a new button “Lost” has been added to allow RM to manually close the Lead. This is particularly useful if the customers dropped off and do not intend to carry on with the intended application.



Buttons	Descriptions
Save	Saves the Lead in BRM
Refer	Initiate referral to a user/team. Some rules governing the referral process: • Allow Leads to be created by party A, refer to party B and furthur refer to specialist C. • In this case, specialist C will become Lead owner to update the Lead information. Party A and party B as a referral can still view the Lead record but not allowed to edit/modify the record. • System will provide Inline search of user or team. 
Duplicate Lead	Create a new copy of the Lead with the respective product package selected

Lost	In the event that customer dropped off and do not intent to carry on with the intended application, users may close the Lead and indicate it as a Lost Lead. Users may input Reasons for Lost Lead if "Others" is selected.  
Initiate Application	Users may click this button to initiate an application. This application will be tied/connected to the Lead. **Note:** This Action button is visible based on configuration at product package. If application initiation is not applicable for some product package then **'Won'** as an action button will be available instead of Initiate application.

Fields	Data Type	Mandatory	Read-Only	Values	Descriptions
Lead Status	-	No	Yes	• New • WIP • Won • Lost	An unique ID (CIF) extracted from Customer 360 ETB records. CIF number will only be reflected if it is an ETB customer. Lead status follows the below logic: 1. New – When the Lead is first created. 2. WIP – When the Lead is engaged by the user and an activity is created in the Lead. 3. Won – Upon initiating an application

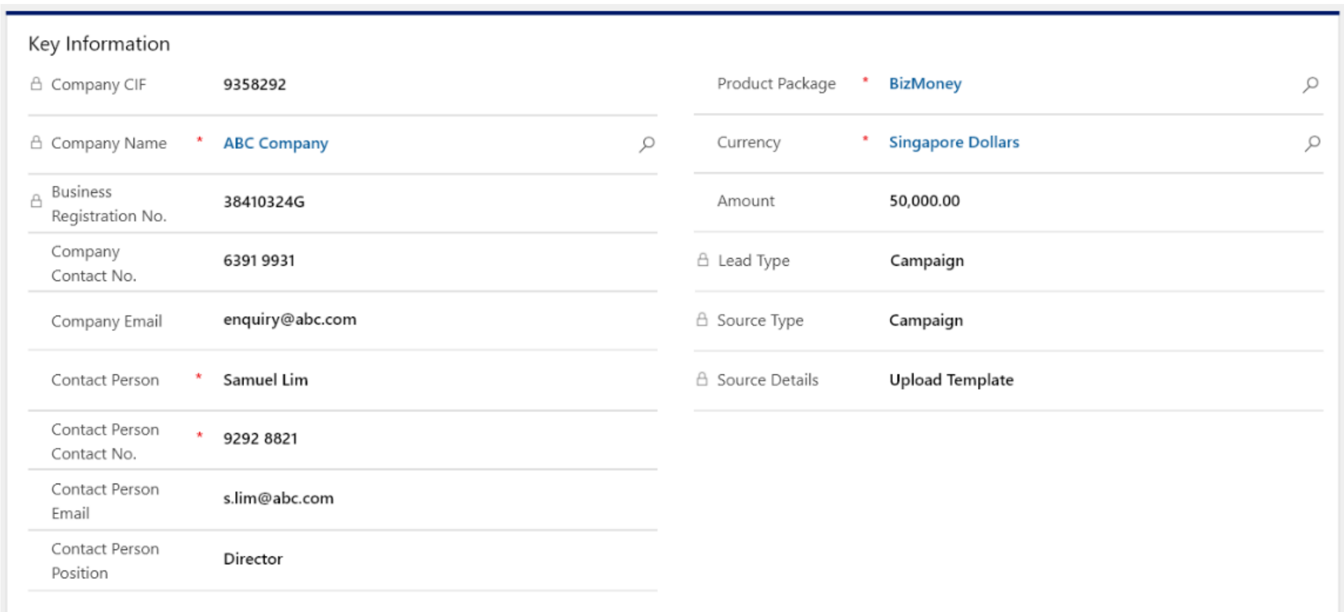
					4. Lost – When customer decides to cancel their online application
Due Date	Date	Yes	Yes	Created Date + 7 days	

Each Lead is also tagged with a Lead title “Leads: Business Banking”.

4.1.3.1 Information Tab

Main tab which User lands on Lead form; contains primary sections and fields for User to fill in / check.

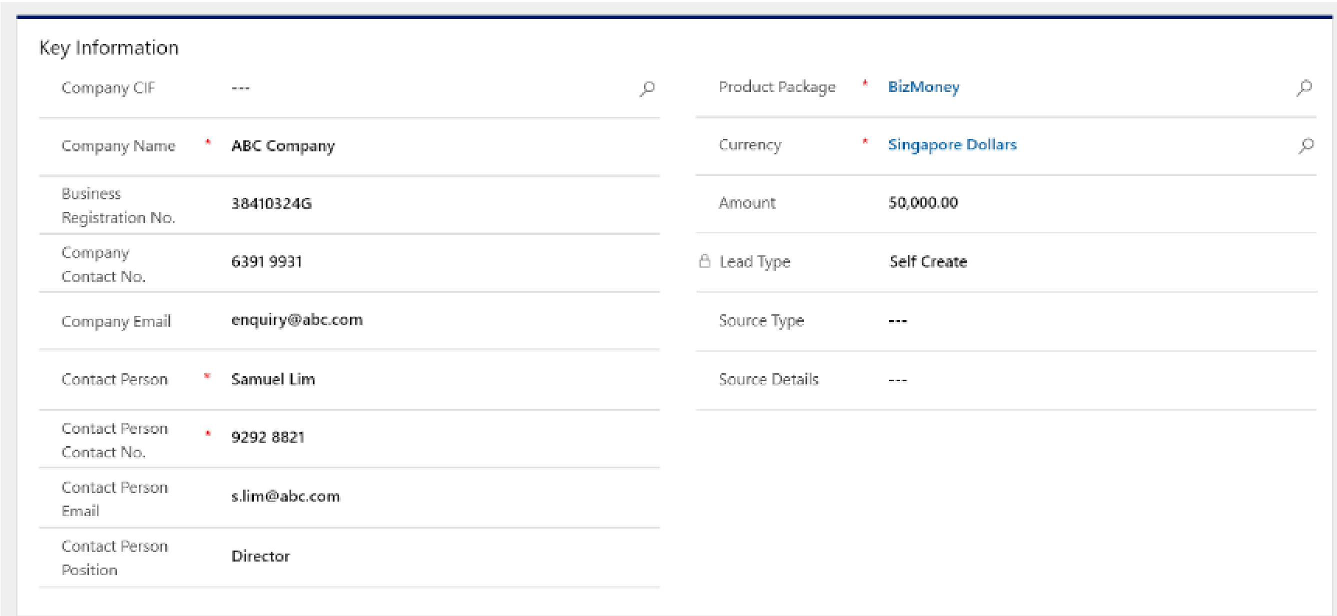
Key information (ETB Customer)



Key Information

Company CIF	9358292	Product Package *	BizMoney
Company Name *	ABC Company	Currency *	Singapore Dollars
Business Registration No.	38410324G	Amount	50,000.00
Company Contact No.	6391 9931	Lead Type	Campaign
Company Email	enquiry@abc.com	Source Type	Campaign
Contact Person *	Samuel Lim	Source Details	Upload Template
Contact Person Contact No. *	9292 8821		
Contact Person Email	s.lim@abc.com		
Contact Person Position	Director		

Key information (NTB Customer)



Key Information

Company CIF	---	Product Package *	BizMoney
Company Name *	ABC Company	Currency *	Singapore Dollars
Business Registration No.	38410324G	Amount	50,000.00
Company Contact No.	6391 9931	Lead Type	Self Create
Company Email	enquiry@abc.com	Source Type	---
Contact Person *	Samuel Lim	Source Details	---
Contact Person Contact No. *	9292 8821		
Contact Person Email	s.lim@abc.com		
Contact Person Position	Director		

Shows information and details relating to the Customer and company entity.

This section provides the baseline when User creates a new Lead record on BRM.

Fields	Data Type	Mandatory	Read-Only	Values	Descriptions
Company CIF	ETB: Lookup NTB: Number	No	ETB: Read-Only NTB: Editable		An unique ID extracted from BWCIF to identify ETB records. CIF number will only be reflected if it is an ETB customer. ETB: Company CIF will be lookup to customer 360 upon selection (based on ID number or name) system will convert lead to ETB. Refer above screen for ETB and NTB customers
Company Name	ETB: Text NTB: Lookup to Customer 360	Yes	ETB: Read-Only NTB: Editable		Name of company
Business Registration No.	Text	No	ETB: Read-Only		Company number (Entity number).

			NTB: Editable		
Company Contact No.	Text	No	No		Contact number of the company
Company Email	Text	No	No		Email address of the company
Contact Person	Text	Yes	No		Name of Customer
Contact Person Contact No.	Text	Yes	No		Contact of Customer
Contact Person Contact Email	Text	No	No		Customer's email address
Contact Person Position	Text	No	No		The position of the Customer
Product Package	Lookup	Yes	No	Refer to Appendix for the **Products and Services Mapping**	Type of Product (i.e BizMoney)[7]. Recommended products and primary product will be populated on the lookup values
Currency	Lookup	Yes	No		Currency type (i.e Singapore Dollars)
Amount	Currency	No	No		Total amount indicated by Customer
Lead Type	Text	No	Yes	• Self created (Existing) • Online (New) • Campaign (Existing)	Type of Lead mainly: 1. Self created – User created Leads on BRM (Exist) **2. Online – Leads created from PWeb Online Channel (New)** 3. Campaign – Uploaded templates from campaigns (Existing capability)
Source Type	Lookup	No	ETB: Read-Only NTB: Editable	• PWeb • BizApp • Ecosystem Partners	Specify the type of Lead source. Source type depends on the Lead type: 1. PWeb – Applicable for Self Assisted Lead type (online)

[7] Refer to Appendix in Section 5 for the Product and Services Mapping from PWeb online to BRM.

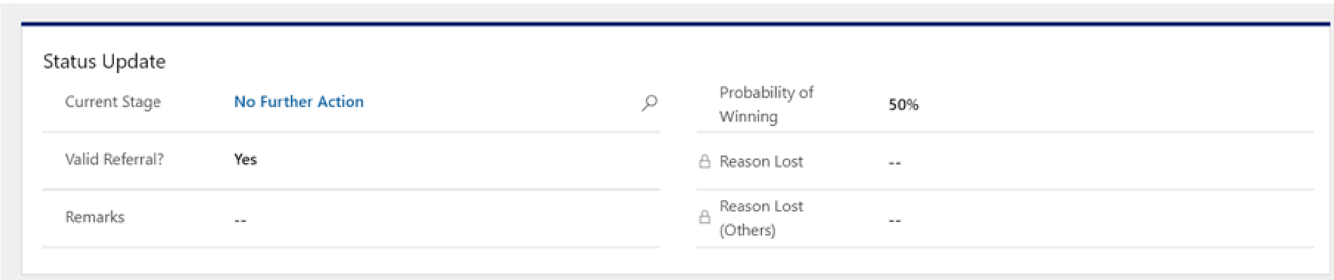
					2. BizApp (online) Ecosystem Partners(online) Note: User can configure 'Source Type' and respective 'Source Details'.
Source Details	Lookup	No	If Lead comes from online PWeb, it will only be a read-only. If Lead is self-created, it will be an user selectable look-up value. ETB: Read-Only NTB: Editable	• MyInfoBiz • Call-Back Form If it is a self created Lead: - BET - Inbound - BET - Outbound - BizCore City - BizCore East - BizCore West - BizMulti City 1 - BizMulti City 2 - BizMulti City 3 - BizMulti East 1 - BizMulti East 2 - BizMulti East 3 - BizMulti PBC - BizMulti Trade - BizMulti West 1 - BizMulti West 2 - BizMulti West 3 - BizPortfolio City - BizPortfolio East - BizPortfolio West - Cash City - Cash East - Cash West - FEB Main - PBC Bt Timah - PBC MBFC	Additional information to describe the Lead source. Source Details depends on the source type. 1. MyInfoBiz – If source type is Online PWeb 2. Call-Back Form – if source type is Online PWeb

				- PBC Mount Elizabeth - PBC Orchard @ 268 - PBC Orchard @ Faber House - PBC Parkway Parade - PBC Raffles - PBC Serangoon Garden - UOB Toa Payoh - UOB Ang Mo Kio - UOB Anson - UOB Bedok - UOB Bedok Safe Box - UOB Bendemeer - UOB Bishan - UOB Boon Lay - UOB Bukit Batok Central - UOB Bukit Panjang - UOB Bukit Timah - UOB Changi Airport - UOB City Plaza - UOB Clementi - UOB Coleman - UOB Farrer Park - UOB Great World City - UOB Holland - UOB Hougang	

				- UOB Hougang MRT - UOB Jalan Sultan - UOB JEM - UOB Jurong Point - UOB Main - UOB MBFC - UOB New Bridge - UOB Northpoint - UOB Novena - UOB Orchard - UOB Parkway Parade - UOB Pasir Ris - UOB Private Banking - UOB Raffles City - UOB Rochor - UOB Serangoon Central - UOB Serangoon Garden - UOB Shaw Center - UOB Suntec City - UOB Tai Seng - UOB Tampines - UOB Thomson - UOB Tiong Bahru Plaza - UOB Upper Bukit Timah - UOB VIvo City - UOB Waterway Point	

				- UOB Woodlands - WBC JEM - WBC Katong - WBC Shaw Center - WBC Tampines	

Lead Status Update

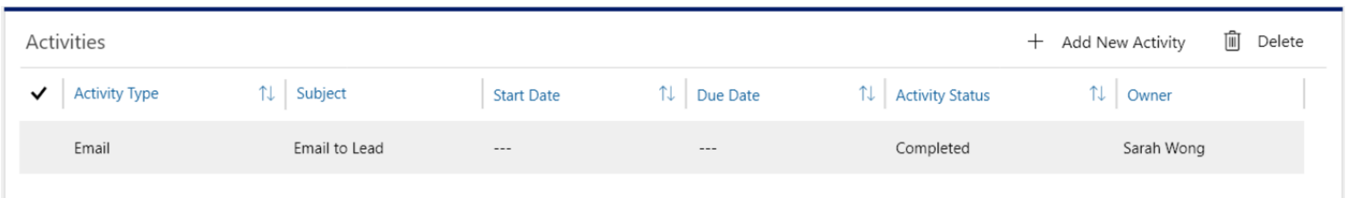


Shows the Lead Status Update.

Fields	Data Type	Mandatory	Read-Only	Values	Description
Current Stage	Lookup	No	No	• <blank> • Pending Documentation • Customer Accepted • Submission • Application • No Further Action	Describes the current Lead stage. Lead stage is important for RM to determine if further actions are required for the Leads.
Probability of Winning	OptionSet	No	No	• *<blank>* • 25% • 50% • 75% • 100%	Determined by the sales team or BET Team based on the past engagements with the customers.
Valid Referral?	OptionSet	No	No	• <blank> • Yes • No	Yes if there is a valid "Referral by" from the online PWeb
Reason Lost	OptionSet	No	Yes	As existing	If Lead is lost, Sales team will be prompted with a pop out box to enter the reason for Lead lost.
Remarks	Text	No	No		User may include any remarks pertaining to the Lead.

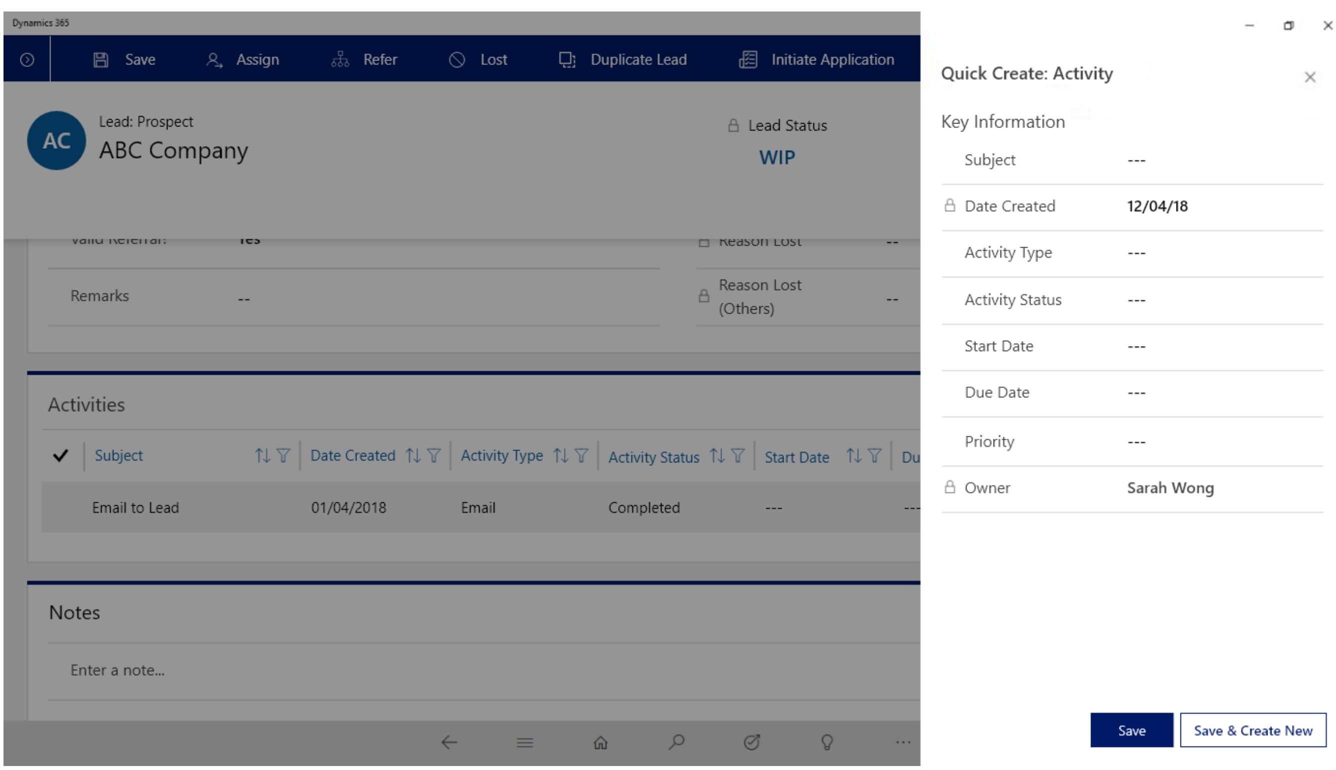
Reason Lost (Others)	Text	No	Yes		Further jusitifications for why the Lead is lost is reflected in this field.

Activities



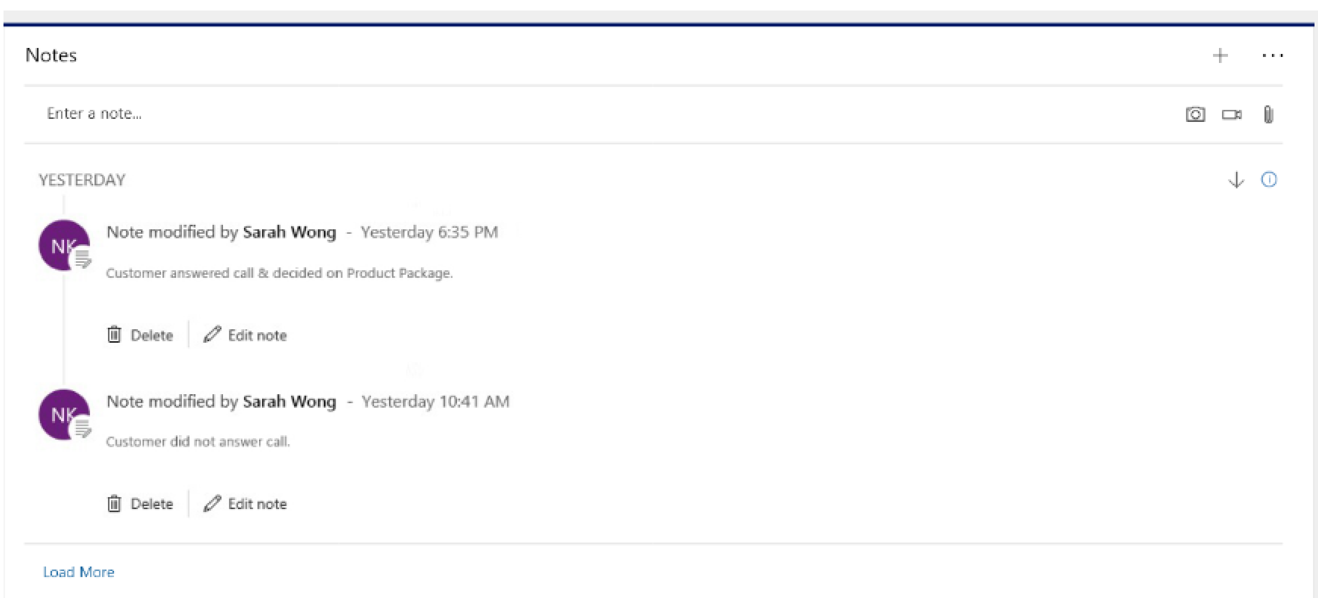
Further activities and follow-ups by the respective teams will be tracked under Activities. The diagram above depicts a few example which shows the touchpoints with the customers by phone calls.

Field	Description
+ Add New Activity	Clicking on the “+ Add New Activity” will expand a “Quick Create: Activity” from the side window. Users may enter the activity details directly in the side pane.
Delete	Select an activity and click on the “Delete” button to remove it.



Fields	Data Type	Mandatory	Read-Only	Values	Description
Subject	Text	No	No		Subject of the activity
Date Created	Date	Yes	Yes		Created date
Activity Type	Text	Yes	No		Channel of activity
Activity status	Text	Yes	No		Status of activity
Start Date	Date	No	No		Indicates the start date of the activity
Due Date	Date	No	No		Indicates the end date of the activity
Priority	Option Set	Yes	No	• Low • Normal • High	Indicates the priority of the activity
Owner	Text	Yes	Yes	Lead owner	Indicates the owner of the activity (Usually the user who is responsible for the Lead)

Notes



User (RM/BET Team) may insert any customer related engagements/feedbacks into this section. This would provide clear visibility and insights to the referred user.

Additional Information

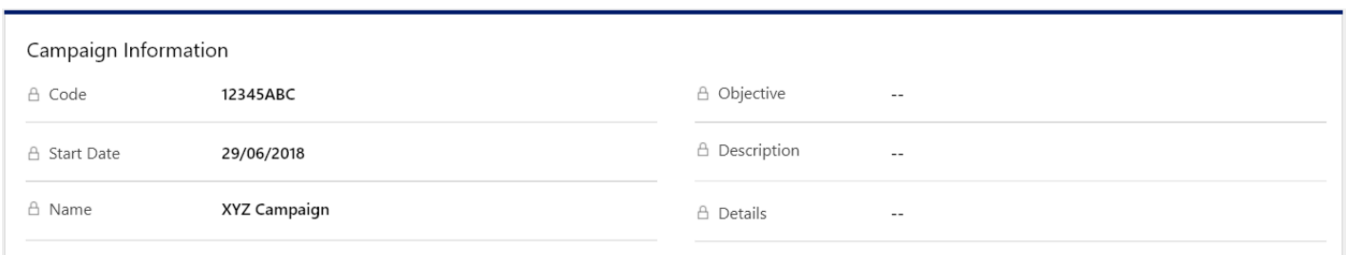

Additional Information

S/N	Description	Comment
2	A. FX Requirements needed (USD, EUR, SGD, JPY)	---
3	B. EXOTIC Currencies (THB, CNY, IDR, TWD) IF ANY	---
4	C. When is the FX expected	---
5	D. TT Frequency / monthly FX Turnover / Quarterly FX Turnover	---
1	E. Customer Transacted (For GMIM; input Yes or No)	---

This section reflects all additional information pertaining to the product tagged to the Lead.

Fields	Descriptions
Description	Description of the information
Comment	Comments on the information

Campaign information (Existing capability)


Campaign Information

Code	12345ABC	Objective	--
Start Date	29/06/2018	Description	--
Name	XYZ Campaign	Details	--

This section keep tracks of the campaign information based on the records inserted in the upload templates.

Fields	Data Type	Mandatory	Read-Only	Values	Description
Code	Text	No	Yes		An unique ID tagged to a specifc campaign.
Start Date	Date	No	Yes		Campaign start date
Name	Text	No	Yes		Name of campaign
Objective	OptionSet	No	Yes		Objective of the campaign
Description	Text	No	Yes		Description of the campaign

Details	Text	No	Yes		Additionl information and details of the campaign

Addresses , Contact Info & Customer-To-Customer sections for ETB Lead fetched from BWCIF

Addresses

Address Type	Address Line 1	Address Line 2	Address Line 3	Address Line 4
Mailing	44	Cecil Street	#25-99	---

Contact Information

Electronic Address Code	Electronic Address Description	Call Consent Indicator	Call Consent Date
Internet/Email	aaa@xyz.com	---	---

Company to Customer

Related CIF No	Name	Relationship Type	Shareholding %
1233248123	Jon Lim Heg Liang	HAS Director	15%

The above section details the information retrieved from Customer 360 (originated in BWCIF), if the customer is identified to be Existing to Bank. Once BWCIF number has been attributed to a Lead, these sections will appear and will be populated. If customer is New to Bank, this section will not appear in the Lead form.

Call Back Notes[8]

Call Back Notes

Product Interested	BizMoney	Self declared existing BB customer	Yes
Recommended Product 1	BizMoney	Preferred Time To Call Back	9am - 12pm
Recommended Product 2	BizSolution	Preferred Branch	---
Recommended Product 3	BizProperty	Enquiry/ Feedback	---
Referred By	---	Preferred Appointment Date and Time	01/04/2018 12:00PM

This section provides a list of questions and responses gathered from the Call-Back Form. A list of all recommended products and sevices from the Interactive Brochure will be captured in this section. This allows users to have a better visibility of the customers' interests/need for other products.

Fields	Applicable to products	Description
Product Interested	All	Primary product that the customer is interested in. This is extracted from the URL segment under the Call-Back Form.
Recommended Product 1	Interactive Brochure	Up to 3 recommended products. Refer to Appendix for the **Product and Services Mapping.**
Recommended Product 2		
Recommended Product 3		
Referred By	Finance/Credit Card and Unsecured Loans - UOB Business Loan - UOB BizMoney Insure - BizCare	Leads which are initiated via the online PWeb flow have a "Referral by" field which indicates the referral source. **2 Scenarios specific to lending:** - When the "Referral by" field is empty, Lead will be assigned to the BET Team. - When the "Referral by" is field is filled, system will check if it is a valid LAN ID with "User" entity in BRM. If valid, Leads will be assigned to that user.

[8] Fields displayed in the Call Back Notes are populated based on the product choice selected on the Call-Back Form. Refer to Appendix for the PWeb Call-Back Form attachment.

		2 Scenarios specific to liability: - When the "Referral by" field is empty, Lead will be visible to all branch users. Branch users will pick up the Lead and assign it to themselves. The Referral by field remains empty. - When the "Referral by" is field is filled, system will check if it is a valid LAN ID. If valid, Leads will be assigned to that user.
Self Declared Existing BB Customer	<u>Transact</u> - Business Debit Card <u>Operate</u> - Payment and Collection Services <u>Finance/Credit Card and Unsecured Loans</u> - UOB Overdraft - UOB Platinum Business Card <u>Finance</u> - Vehicle and Machinery Financing - Government Assistance Scheme <u>Invest</u> - Investment - Foreign Exchange <u>eServices</u> - Business Internet Banking Plus - UOB eAlerts <u>Trade</u> Trade Services	For customers that have self-declared that they are existing BB customers

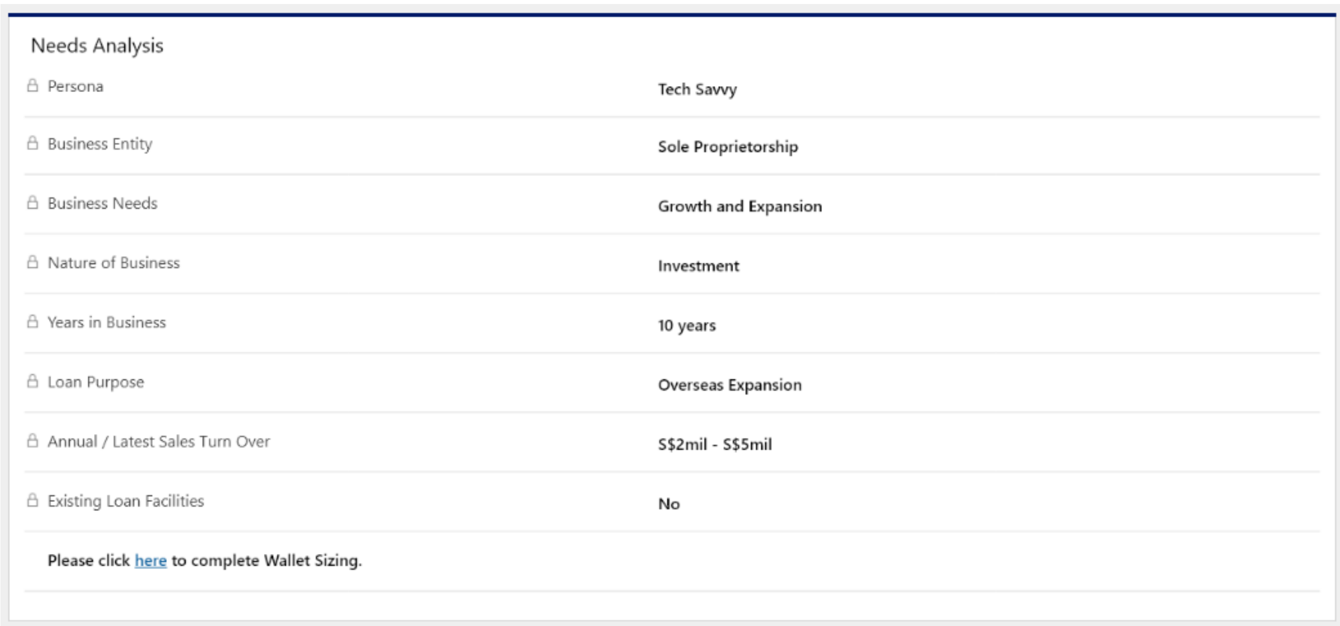
	<u>Finance/Credit Card and Unsecured Loans</u> - UOB Business Plus Card <u>Transact</u> - Fixed Deposits <u>Insure</u> - BizCare <u>Interactive Brochure</u>	
Preferred time to receive a call back	<u>Transact/Deposit and Cash Management</u> - Business Debit Card <u>Operate</u> - Payment and Collection Services <u>Finance/Credit Card and Unsecured Loans</u> - UOB Overdraft - UOB Platinum Business Card <u>Finance</u> - Vehicle and Machinery Financing - Government Assistance Scheme <u>Invest</u> - Investment - Foreign Exchange <u>eServices</u> - Business Internet Banking Plus - UOB eAlerts <u>Transact</u> - Fixed Deposits	Reflects the customer choice of call back time.

	Interactive Brochure	
Preferred Branch	Transact/Deposit and Cash Management - Business Debit Card Operate - Payment and Collection Services Finance/Credit Card and Unsecured Loans - UOB Overdraft - UOB Platinum Business Card Finance - Vehicle and Machinery Financing - Government Assistance Scheme Invest - Investment - Foreign Exchange eServices - Business Internet Banking Plus - UOB eAlerts Interactive Brochure	Customer's preferred branch for appointment.
Enquiry / Feedback	Transact/Deposit and Cash Management - Business Debit Card Operate - Payment and Collection Services Finance/Credit Card and Unsecured Loans - UOB Overdraft	Enquiry/feedback provided by customer

	- UOB Platinum Business Card Finance - Vehicle and Machinery Financing - Government Assistance Scheme Invest - Investment - Foreign Exchange eServices - Business Internet Banking Plus - UOB eAlerts Transact - Fixed Deposits Interactive Brochure	

- **Needs Analysis**[9]

[9] Fields displayed in the Customer Self Declare info are populated based on the product choice selected on the Call-Back Form. Refer to Appendix for the PWeb Call-Back Form attachment.



Needs Analysis

Persona	Tech Savvy
Business Entity	Sole Proprietorship
Business Needs	Growth and Expansion
Nature of Business	Investment
Years in Business	10 years
Loan Purpose	Overseas Expansion
Annual / Latest Sales Turn Over	S$2mil - S$5mil
Existing Loan Facilities	No

Please click here to complete Wallet Sizing.

Needs Analysis section displays customer self-declared information, such as 1) responses coming from the optional Interactive Brochure, which the Customer may have completed on Pweb and/or b) Wallet Sizing questions coming from Customer 360 (Displayed as a link).

For self created scenarios, only a link to the walletsizing in customer 360 will be displayed in this section.

Needs Analysis

Please click here to complete Wallet Sizing.

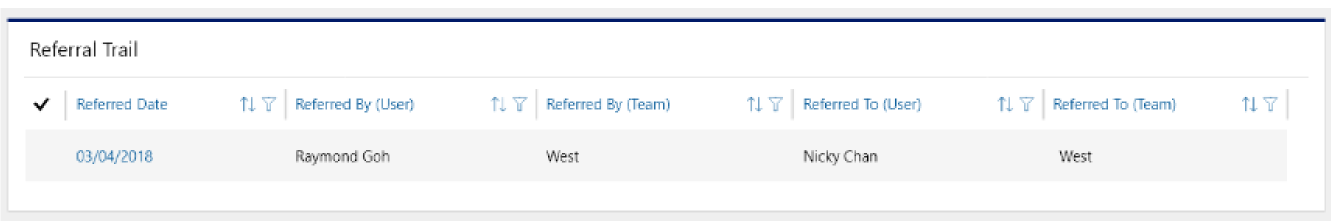
Fields	Applicable to Products	Description
Persona	All	Personality type of the Customer
Business Entity	Interactive Brochure Transact/Deposit and Cash Management/ - UOB BizTransact Account - UOB eBusiness Account - Singapore Dollar Current Account - Global Currency Account	Type of the business

	Operate - Payroll services	
Business Needs	Interactive Brochure	Indicate customer's reason for application. - Growth and Expansion - Transaction Savings Allow me to bank with ease
Nature of Business	Interactive Brochure Insure - BizCare	Business nature. **Applicable to Growth and Expansion.**
Years in Business	Finance/Credit Card and Unsecured Loans - UOB Business Loan - UOB BizMoney Interactive Brochure	Number of years in business. **Applicable to Growth and Expansion.**
Loan Purpose	Interactive Brochure	Purpose of loan. **Applicable to Growth and Expansion.**
Annual / Latest Sales Turn Over	Finance/Credit Card and Unsecured Loans - UOB Business Loan - UOB BizMoney Interactive Brochure	Sales Turn over on an annual/latest basis. **Applicable to Growth and Expansion.**
Existing Loan Facilities	Interactive Brochure	Existing loan facilities. **Applicable to Growth and Expansion.**
Main Operating Account with	Finance/Credit Card and Unsecured Loans - UOB Business Loan - UOB BizMoney	Main operating Account
Transact in Foreign Currencies	Interactive Brochure	Do the customer transact in foreign currencies? **Applicable to Transaction Savings / Allow me to Bank with ease.**
Preferred Transaction Channel		Customer's preferred transaction channel (i.e Cheques, cash or electronic) **Applicable to Transaction Savings.**
Average Account Balance		Average account balance range. **Applicable to Transaction Savings.**

Standard Payment or Fund Transfer Every Month		Do the customer have standard payment or fund transfer every month? **Applcable to Allow me to Bank with ease.**
Transact with Debit / Credit Card		Do the customer transact with Debit/Credt card? **Applcable to Allow me to Bank with ease.**

4.1.3.2 Tracking Tab

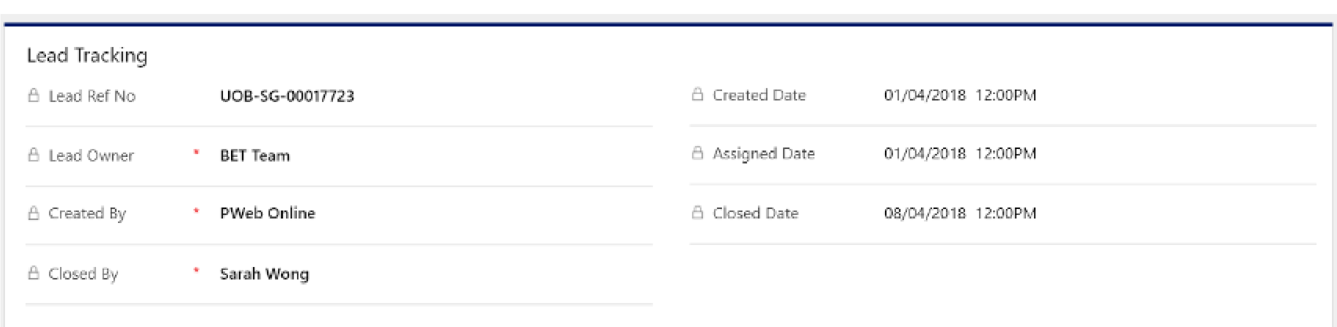
Referral Trail



All past referrals will be tracked under the Referral Trail section.

Fields	Descriptions
Referred Date	Date of referral
Referred By (User)	Name of the user which initiated the referral
Referred By (Team)	Team referred by (Sales or BET)
Referred To (User)	Name of the user referred to
Referred To (Team)	Team referred to (Sales or BET)

Lead Tracking



This section provides an overview of the Lead assignment.

Fields	Data Type	Mandatory	Read-Only	Values	Descriptions
Lead Ref No	Text	No	Yes		An unique ID tagged to the Lead. This number is automatically generated by BRM.
Lead Owner	Lookup	Yes	Yes		Indicates the person in charge of the Lead. **Default** 1. Assigned to the user indicated under the "Referral by" field for online flow. 2. For self created Leads, Lead owner will be assigned directly to the user who created the Lead. **Assigned** Leads which is assigned to the user will be reflected as the Lead Owner.
Created By	Lookup	Yes	Yes		Indicates the source of creation. Unlike Lead Owner, Leads Created By will not change and is specific to source.
Closed By	Lookup	Yes	Yes		Indicates the name of the user who closed the Lead (won/lost)
Created Date	Date	No	Yes		Date of Lead creation
Assigned Date	Date	No	Yes		Most recent date of Lead assignment.
Closed Date	Date	No	Yes		If Lead is closed (won/lost), the date will be captured and gets reflected in this field.

5 APPENDIX

Interactive Brochure

Questions on the Interactive Brochure will be populated based on each responses. Refer to file below for the list of permutation of questions.

Copy of Interactive Brochure Matrix with (

PWeb Call-Back Form

Shows all the fields required on Leads in BRM under the (Call-back notes and Needs Analysis) sections. This is specific to the type of lending and liability products selected on Online PWeb.

PWEB call back.xlsx

Products and Services Mapping

Shows all the products and services mapping from PWeb Online to BRM.

Product Mapping.xlsx

Revision History

Date	Version	Description	Author
20-Oct-18	v0.1	First draft of Leads FSD	Nicholas Chan
29-Oct-18	V0.2	Updated	Nicholas Chan
31-Oct-18	V0.2	Cope and matrix added	Tatiana Collins
31-Oct-18	V0.3	Reviewed and amended throughout	Tatiana Collins
31-Oct-18	V0.4-0.7	Review and amendments to scope and processes	Tatiana Collins
05-Oct-18	V0.8	Data mapping, new screens and business rules added	Nicholas Chan
06-Oct-18	V0.9	Reviewed and amended throughout	Tatiana Collins
14-Oct-18	V1.0	Updated Data mapping, System Flows, new screens descriptions, business rules and assumptions based on the last work shop held on 12th Nov with business user. Added comments for discussion during FSD review.	Nicholas Chan
04-dec-18	V1.1	Reviewed and amended throughout	Tatiana Collins

Project Code :	Date Created :	File Name : BRM Regional BizConnect P2 – Leads - SG
Object ID : SA02	Date Printed :05 Dec 2018	Version : 1.1

6 SIGN OFF

We confirm that we have reviewed and accepted the Functional Specifications dated 5th Dec 2018 (version 1.1), subject to the following qualifications/conditions (if any):

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Name of User Department/Division

Name/Designation | Signature | Date

Name/Designation | Signature | Date

Business Technology Services Division

Name/Designation | Signature | Date

Name/Designation | Signature | Date

Name of Vendor (if applicable) ______________________

Name/Designation	Signature	Date

Name/Designation	Signature	Date