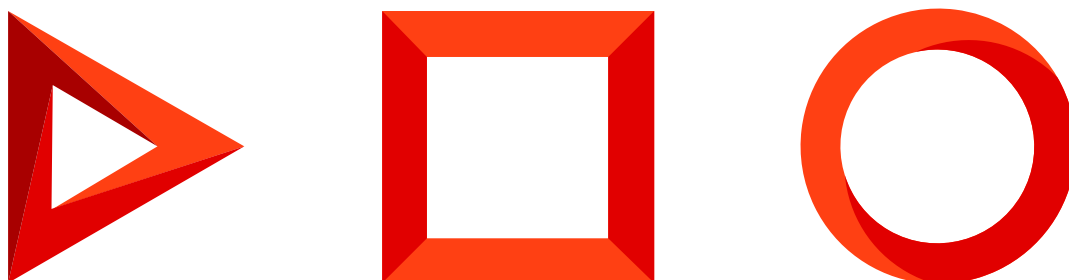


Financial services

Conduct a consultation

Version 7.17



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Conduct a consultation

PRODUCTS: **BANK CUSTOMER JOURNEY** **LENDING**

During a consultation with a client, you can create a new client record in the system and sell a product. You can also interrupt the consultation and continue it at a later time.

Start a consultation

1. Click the [Start consultation] button (Fig. 1). The button is available if the client was found in the database.

Fig. 1 - Beginning a consultation

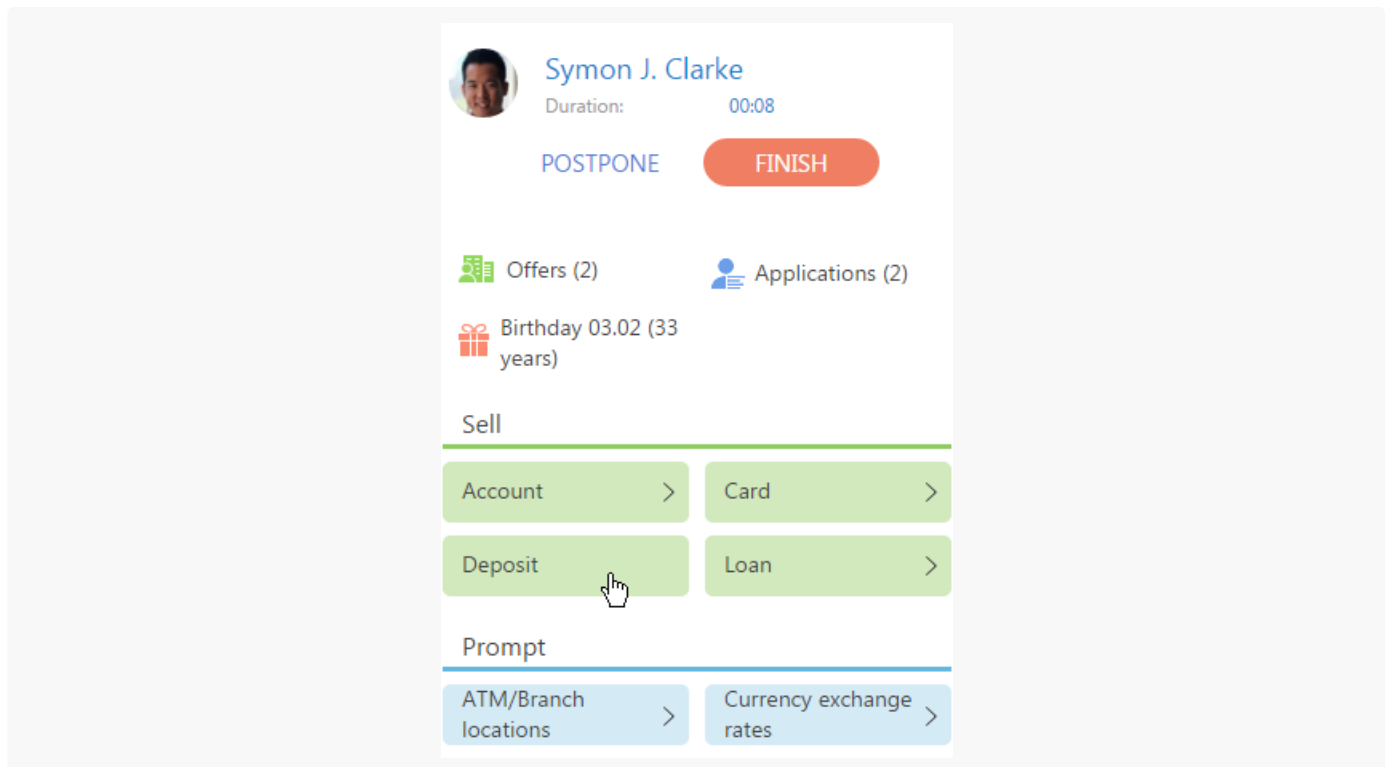
The screenshot shows a web interface for starting a consultation. At the top, there's a title 'Start consultation'. Below it are three input fields: 'ID', 'Phone', and 'Card'. The 'Phone' field is selected and contains the text 'Clarke' and '+44 (15) 4350 7354'. Below the input fields are two buttons: 'SEARCH' (green) and 'CLEAR' (blue). Underneath, there's a 'Search result' section with a profile card for 'Symon J. Clarke'. The card displays his birth date as '2/21/1983', mobile phone as '+44 (15) 1440 5222', and business phone as '+44 (15) 4350 7354'. At the bottom of the card is a prominent blue button labeled 'START CONSULTATION' with a mouse cursor hovering over it.

If the client was not found, the consultation process will start as soon as the manager clicks the [*New customer*] button.

After the manager starts the consultation, the contact page will open. The system will automatically create a case, in which all consultation themes will be recorded.

2. Select the product name in the consultation panel block (Fig. 2).

Fig. 2 - Selecting a theme in the consultation panel

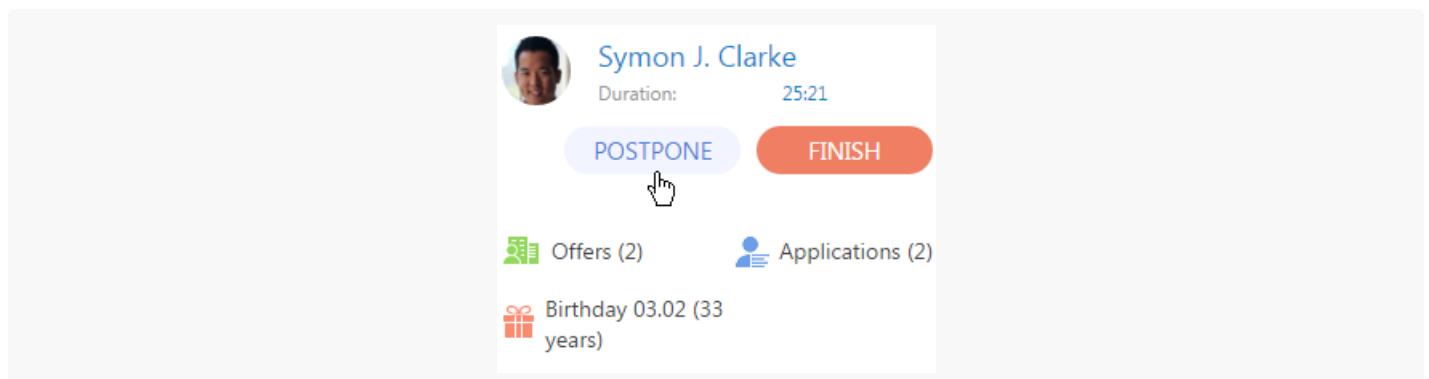


When you click a theme in the consultation block, the system runs the business process specified for that theme in the [*Consultation theme blocks*] lookup.

Postpone the consultation

Click the [*Postpone*] button (Fig. 3) to postpone a consultation for a later time.

Fig. 3 – Postponing a consultation with the client



The consultation timer will pause and the postponed consultation will appear in the [*Continue consultation*] block.

Note. The [*Continue consultation*] block can contain multiple postponed consultations.

Click the [*Continue*] button in the [*Continue consultation*] block (Fig. 4) to resume the selected consultation.


Fig. 4 – Resuming a consultation

Start consultation

ID	Phone	Card
Clarke		
+44 (15) 4350 7354		

SEARCH CLEAR

Search result

 **Symon J. Clarke**

Birth date 2/21/1983

Mobile phone +44 (15) 1440 5222


Business +44 (15) 4350 7354

START CONSULTATION



Complete the conversation


To complete the consultation, click the [*End*] button (Fig. 5).

Fig. 5 - Completing a consultation

 **Symon J. Clarke**
Duration: 27:57

POSTPONE **FINISH**

 Offers (2)  Applications (2)

 Birthday 03.02 (33 years)

Sell

Account >	Card >
Deposit >	Loan >

Prompt

ATM/Branch locations >	Currency exchange rates >
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The status of the consultation will be changed to [*Closed*].

Handle consultation results

After you complete the consultation, a page will open where you can enter the consultation results and close the corresponding case (Fig. 6).

Fig. 6 – Page for entering the consultation results

The screenshot shows a web interface for setting consultation results. The title is "Set results on case SR00000001". The form is divided into several sections:

- Individual:** Symon J. Clarke
- Legal entity:** (empty field)
- Status:** Open
- Description:** Mr. Clarke is looking for a reliable bank
- Consultation themes:** A section with a plus sign (+) to expand the list.
- Subject:** Deposit (selected from a dropdown menu)
- Result:** Need discovered (selected from a dropdown menu)
- Comment:** 30 000 ti 50 000 USD

At the bottom right, there are two buttons: a green "FINISH" button and a blue "CANCEL" button. A mouse cursor is pointing at the "FINISH" button.

To enter results for the consultation:

1. Click the + button on the [Consultation themes] detail.
2. Select the consultation theme in the [Theme] field.
3. Enter the result of consultation regarding the selected theme in the [Result] field.
4. Click the [Complete] button.