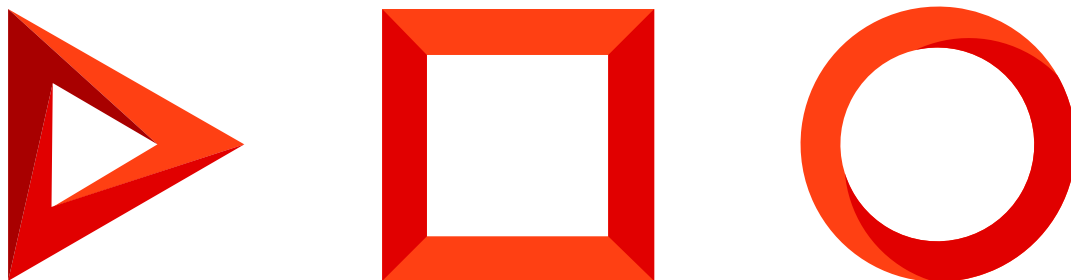


# Financial services

## Conduct a consultation

Version 8.0



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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

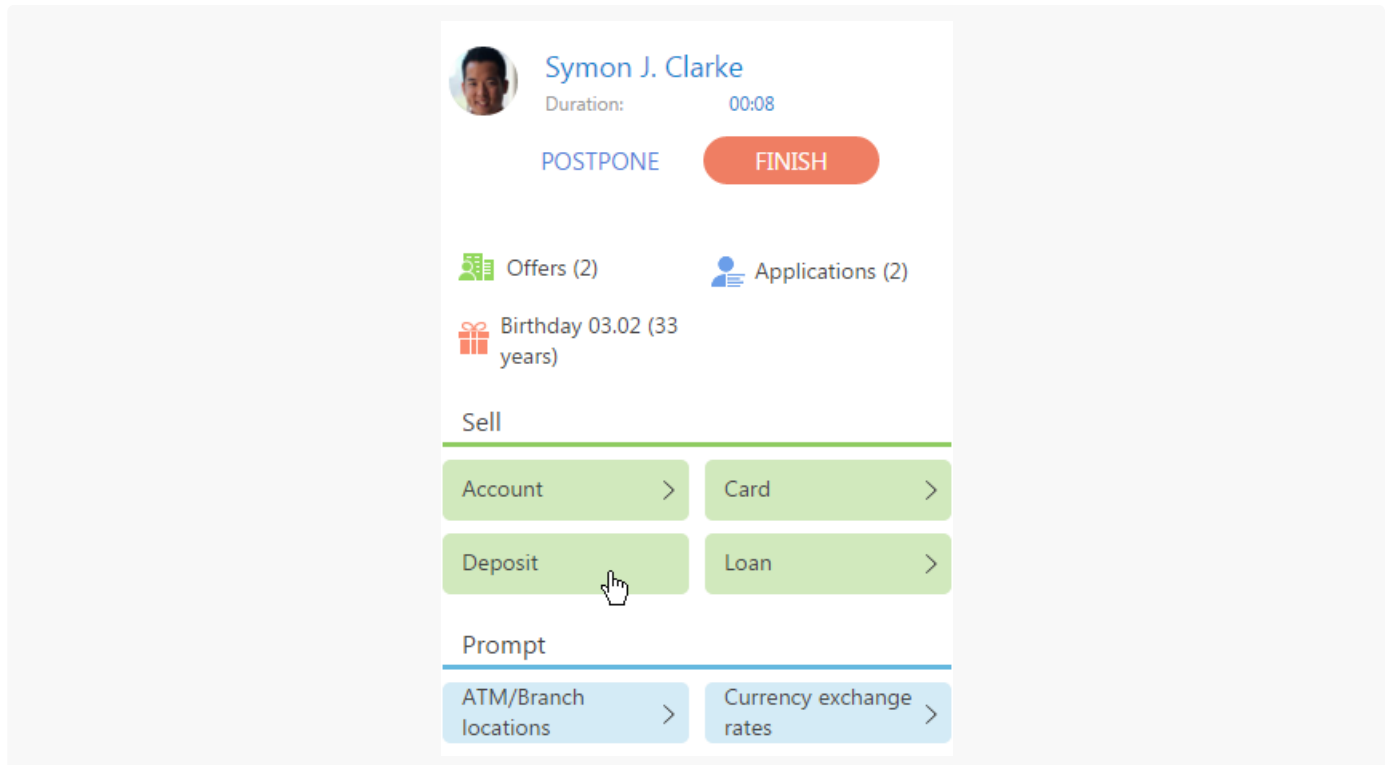
The screenshot shows a web interface for starting a consultation. At the top, there are three tabs: 'ID', 'Phone', and 'Card', with 'Phone' selected. Below the tabs, the name 'Clarke' and the phone number '+44 (15) 4350 7354' are displayed. There are two buttons: a green 'SEARCH' button and a blue 'CLEAR' button. Below this is a 'Search result' section for 'Symon J. Clarke', which includes a profile picture, birth date '2/21/1983', mobile phone '+44 (15) 1440 5222', and business phone '+44 (15) 4350 7354'. A prominent blue 'START CONSULTATION' button is at the bottom of the search result, 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

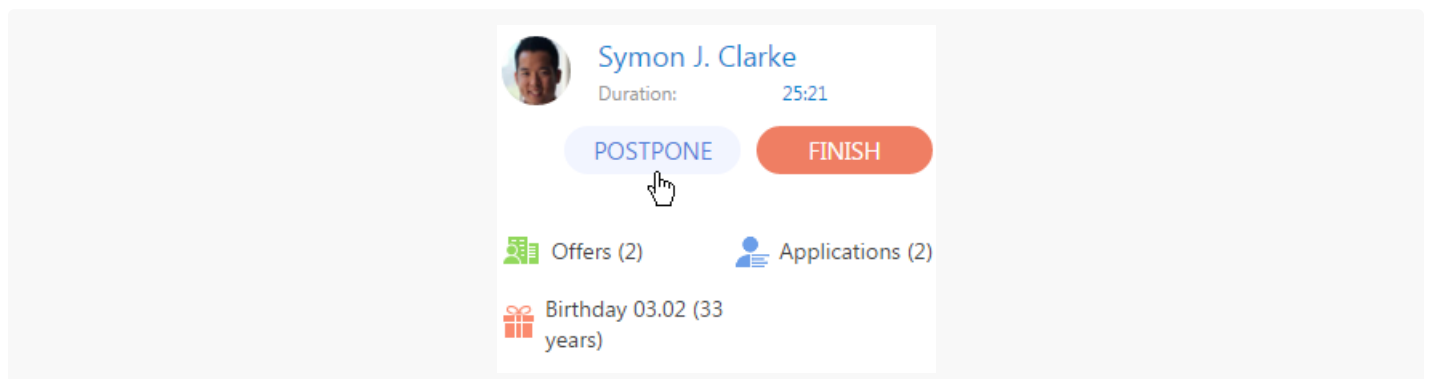


When you click a theme in the consultation block, the system runs the business process specified for that theme in the [ *Consultation theme blocks* ] lookup.

## 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		
<b>SEARCH</b>	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 >
------------------------	---------------------------

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

Set results on case SR00000001

Individual	Symon J. Clarke	Description	Mr. Clarke is looking for a reliable bank
Legal entity			
Status	Open		
Consultation themes +			
Subject *	Deposit	Comment	30 000 ti 50 000 USD
Result	Need discovered		

FINISH CANCEL

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.