

Product selection

Select a banking product

Version 8.0



This documentation is provided under restrictions on use and are protected by intellectual property laws. Except as expressly permitted in your license agreement or allowed by law, you may not use, copy, reproduce, translate, broadcast, modify, license, transmit, distribute, exhibit, perform, publish or display any part, in any form, or by any means. Reverse engineering, disassembly, or decompilation of this documentation, unless required by law for interoperability, is prohibited.

The information contained herein is subject to change without notice and is not warranted to be error-free. If you find any errors, please report them to us in writing.

Table of Contents

Select a banking product

4

Select a banking product

PRODUCTS: [BANK CUSTOMER JOURNEY](#) [LENDING](#) [BANK SALES](#)

Creatio product selection enables the customer assistant to find products from the catalog that meet the customer's needs and submit product applications on behalf of contacts or legal entities. You can use Creatio product selection in any business logic. Learn more: [Set up a product selection process](#).

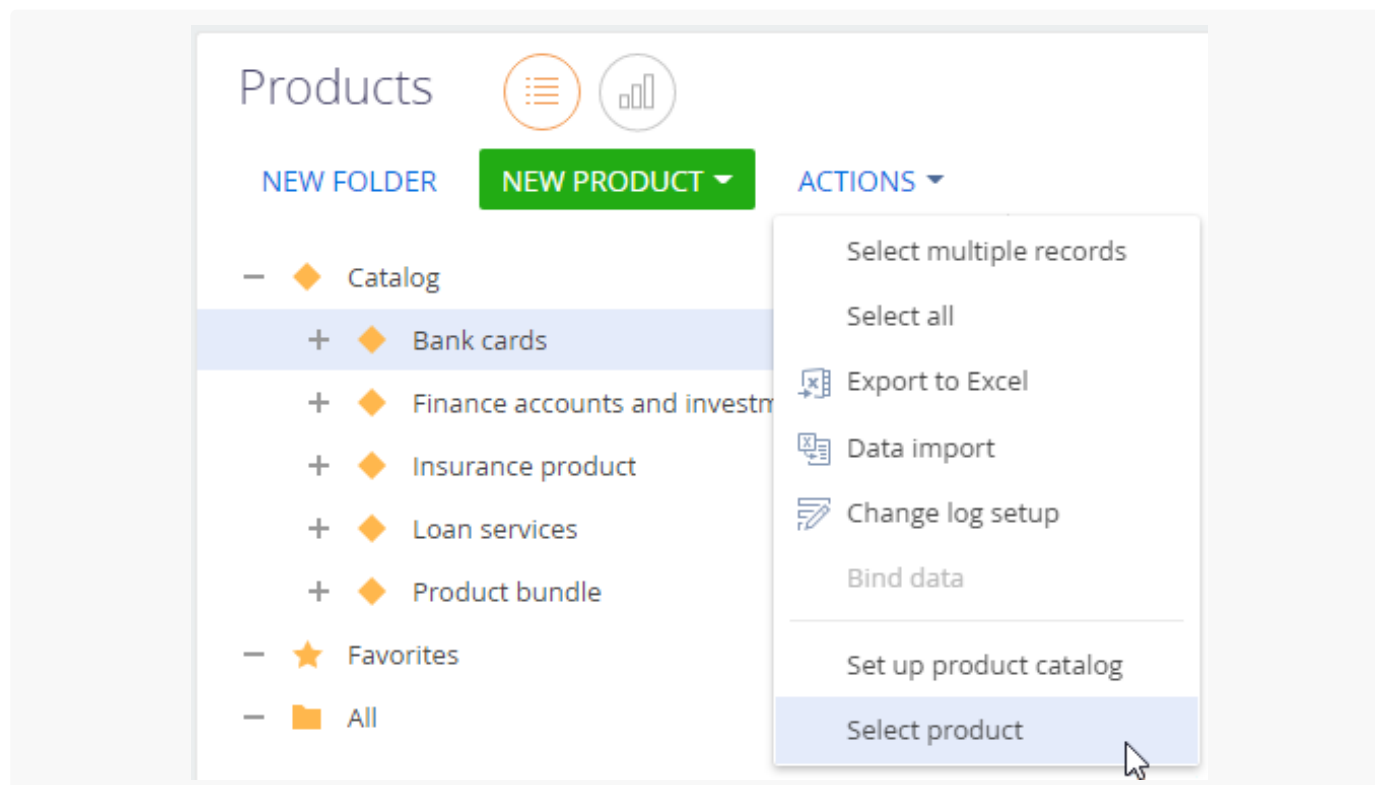
Creatio displays only the available products on the product selection page.

Note. This article covers the basic product selection procedure. If you have a custom product selection business logic set up in your application, the procedure may be somewhat different.

To select a product for a customer:

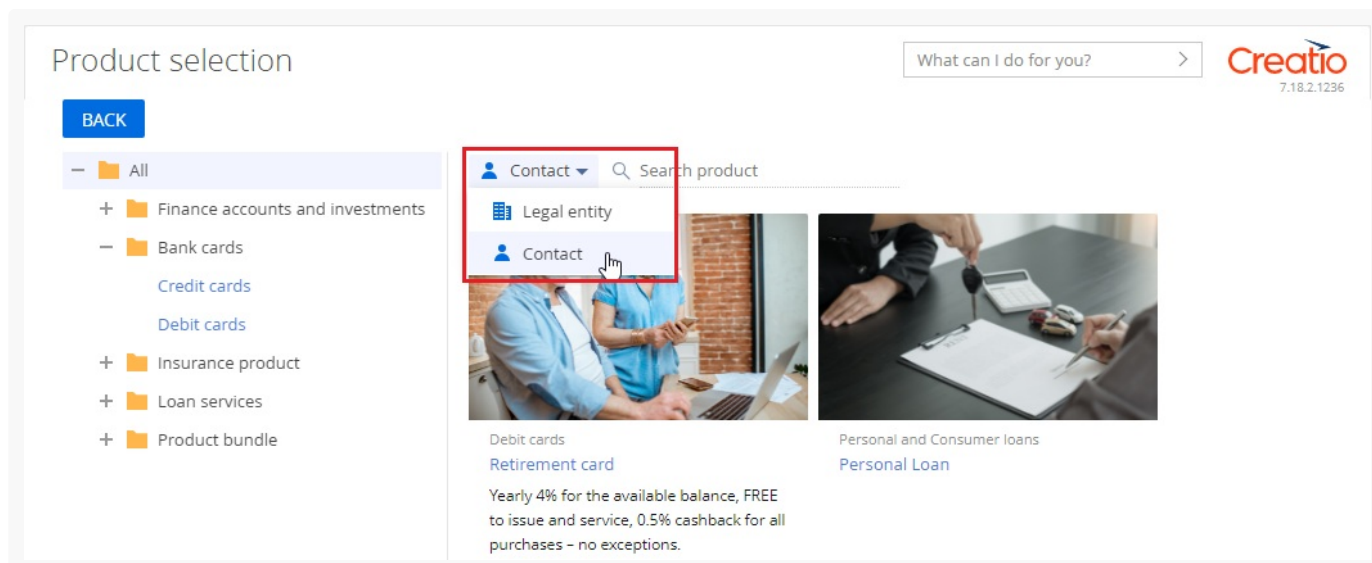
1. Open the [*Products*] section.
2. Click [*Actions*] → [*Select a product*] (Fig. 1).

Fig. 1 Access product selection from action menu in the [*Products*] section



3. At the top of the selection page, select the entity for which to perform the selection: a contact or a legal entity (Fig. 2).

Fig. 2 Set up product filters by the target audience




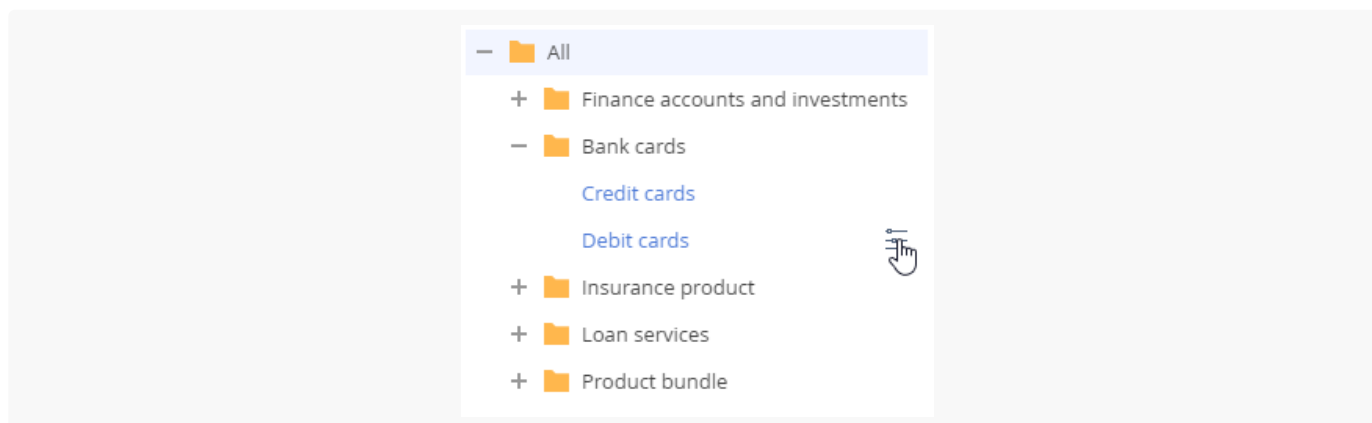
4. Select the product category, such as bank cards.
5. Select the product type, such as credit cards.
6. Click the  button to the right of the product to enter the advanced search parameters. This will open a menu with the details of all products of this type.

Fig. 3 Open the product details



7. Select the details that meet the customer's requirements (Fig. 4).

Fig. 4 Select products by details

The screenshot displays the 'Product selection' screen in the Creatio banking application. The interface is divided into several sections:

- Header:** Includes a search bar with the text 'What can I do for you?', the Creatio logo with version number '7.18.2.1236', and a user profile icon.
- Left Sidebar:** A vertical navigation menu with various icons for home, messages, charts, and other functions.
- Main Content Area:**
 - Filter:** A 'Debit cards' filter is selected, showing options for 'Legal address, months', 'Resident' (Yes/No), 'Additional card issuance' (Yes/No), 'Annual additional card fee', 'Annual fee', 'Average daily balance', 'Card categories' (MasterCardGold, MasterCardPlatinum, MasterCardStandart, VisaClassic, VisaElectron, VisaGold, VisaPlatinum), and 'Card issuance fee'.
 - Product Detail:** A 'Retirement card' is highlighted, featuring an image of an elderly couple and the following text: 'Debit cards Retirement card. Yearly 4% for the available balance, FREE to issue and service, 0.5% cashback for all purchases - no exceptions.'
- Right Sidebar:** A vertical menu with icons for user profile, messages, and other notifications.

8. Click the product to view its main details and advantages (Fig. 5). This will open a box.

Fig. 5 View the main details and advantages

The screenshot displays the 'Product selection' page in the Creatio system. On the left, a dark sidebar contains navigation icons. The main area features a search bar at the top right with the text 'What can I do for you?'. Below the search bar, there's a 'Contact' dropdown and a 'Search product' input. A left-hand menu lists categories: 'All', 'Finance accounts and investments', 'Bank cards' (expanded to show 'Credit cards' and 'Debit cards'), 'Insurance product', 'Loan services', and 'Product bundle'. The main content area shows five product cards:

- Retirement card** (Debit cards): Yearly 4% for the available balance, FREE to issue and service, 0.5% cashback for all purchases - no exceptions.
- Global Auto Card** (Credit cards): 2% cashback for all gas stations, a car giveaway, larger fuel discounts, 24/7 Assistance service.
- "Morsel" loans** (Credit cards): Installment payments for products, up to 6 months, any store, GRACE PERIOD, interest rate from 0.0001%, for goods...
- Sapphire Reserve** (Credit cards): Tailored to comfort and high service level connoisseurs, affirms the owner's wealth and status.
- Bonus Card** (Credit cards): 500 points for activating a card, up to 40.

On the right side of the interface, there is a vertical navigation bar with icons for user profile, settings, help, and communication, along with notification badges (28 and 1).

- a. Click the [*Details*] button in the box **to view the detailed product details**. The product page with the complete list of details will open.
 - b. If the product does not satisfy the customer, click [*Close*] to **return to selection**.
 - c. If the product does satisfy the customer, click [*Application*] to **submit an application**.
9. As a result, Creatio will add a new application for the selected product in the background.
- a. Open the [*Applications*] section.
 - b. Open the created application in the section list. You can find it using the creation date and the product.
 - c. In the application, specify the customer for whom you selected the product, then pass the application for further processing. Learn more: [Process an application](#).

Note. You can automate product selection to save time on filling out applications and opportunities. Creatio will populate them automatically from the case or process parameters. Learn more: [Set up a product](#)

[selection process.](#)