FINANCIAL SERVICES CREATIO FOR END USERS

Who should take this course: This training is designed for new end-users of the Financial Services Creatio, Bank Sales Edition , Bank customer journey edition and Lending edition.

What to expect: Participants will obtain basic knowledge of the functionality, processes and tools in Financial Services Creatio, Sales Edition , Bank customer journey edition and Lending edition.

Course duration & format: The training takes place over 5 days with a total of 10 hours. In-person or online.

Time	Topic
	DAY 1. GETTING STARTED
30 min	**Introduction to interface and system terminology** • Creatio Academy. How to search the Academy.
30 min	**360° Customer view. Unified database of individuals and legal entities** • Managing client/partner/competitor data in the “Account” section • Managing contacts and employee data in the “Contact” section
30 min	**Database management** • Duplicate search and merging • Setup and synchronization with Google Contacts (overview) • Exchange contact synchronization (overview) • Export into Excel **Section Page list setup**
30 min	**Organizing and searching for data in the system** • Filtration types: quick, standard, advanced • Creating custom folders and tags • Adding aggregate columns onto the Section page • Command line use and setup • Building public and private dashboards • Drill-down in dashboards

Time	Topic
	DAY 2. PRODUCTS & LEAD MANAGEMENT
1 hour	**Product Catalog Management** • Product categorization • Maintaining multiple price lists • Product catalog in Orders and Invoices • Multilevel product catalog and faceted product search **Next-best-offer: product and service recommendations**
1 hour	**Managing leads** • Principles of the lead management in Creatio • Lead registration Methods of filling the lead database in Creatio • Work on the proven business processes of lead management

Time	Topic
	DAY 3. BANK SALES EDITION
1 hour	**Sales management – managing long-term transactions with customers in a single section** • Purpose of the opportunity stage • Creating an opportunity team and a list of customer’s contacts in the opportunity • Recording and tracking changes of the opportunity tactics by a manager. Competitors and their products • Opportunity history (Changes of stages in activities, invoices, orders and documents) • Estimation of manager’s efficiency **Planning and analysis of the actual implementation of expected revenue**
1 hour	**Managing agreements and documents** • Single list of contracts, agreements and specifications • Processing of agreements • Managing subordinate contracts: agreements and specifications for contract • Single list of documents

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	DAY 4. LENDING EDITION
30 min	**Registering loan applications** • Registration methods • Content management • Status management
30 min	**Verification and underwriting** • Creating the mechanism for verification of applications • Configuration of verification actions • Application life cycle **Working with preconfigured dashboards**
30 min	**Home page – a flexible tool for organizing work of verifier** • Agent desktop overview • Managing queues – planning the work with a flow of applications
30 min	**Managing the basic tools** • Contracts • Cards • Accounts • Financial indicators

Time	Topic
	DAY 5. CUSTOMER JOURNEY EDITION
30 min	**Managing customer applications** • Registration methods • Content management • Status management
1 hour	**Managing cases** • Organizational structure of the service center **Registering and detecting the cases** • Recording the main information (contact and subject) • Automatic registration of cases based on incoming emails • Registration of case based on an incoming call **Case investigation and resolution** • Proven processes for case processing • Work with knowledge base when resolving cases **Working with dashboards preconfigured for case database**
30 min	**Working with consulting panel** • Consulting process • Case registration • Managing products and services for consulting