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Central Bank of India
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## Marketing Department, Central Office

# Portal for Marketing Team: User Guide

### Background

Marketing task force has been setup in Regions for boosting marketing activities. Based on the requirement of Marketing department, Development team DIT-Central Office has developed this Marketing portal. Marketing Portal has been developed to ensure that leads generated by marketing force team are materialised at branch level through follow up & monitoring. Marketing team at field would be able to submit day to day information about business leads through Marketing portal for further processing by branch. This would also enable marketing department at RO/ZO/CO to keep track of progress of individual marketing staff as well as Regions/Zones for conversion of leads into business.

### Features

- Available on CBS network at site address: **http://ditportals.cbi.co.in/marketing**
- Can be accessed by designated users at Branch/RO/ZO and CO level using same credentials (Emp. No. / Password) as used for windows login, HRMS login.
- Marketing Task Force can submit day to day progress.
- Branch can submit business leads conversion information.
- Controller Offices-RO/ZO/CO get MIS/Dash board/Excel for monitoring & follow-up.

### Process flow

| User Level | Activities at Portal |
|---|---|
| **Marketing Task Force (MTF)** | MTF user will punch & submit the customer wise business lead information in the portal after meeting the probable customers. The lead data will be available only to the preferred branch punched by MTF user, based on customer preference. User must check the punched information before submission. After forwarding to Branch, record will be locked and any correction in lead data (like mobile no. address, branch etc.) will be possible only after unlocking by RO level user.<br><br>**MTF User Process:**<br>• Open marketing portal **http://ditportals.cbi.co.in/marketing**<br>• Login to portal with Emp. No. and windows/HRMS password. (User can see the logged in user name and user type at top right of screen after login. For lead punching user type must be- **Marketing**)<br>• Go to Menu option: **Marketing**> **Fresh Leads:** It will open lead data entry screen for marketing person. Enter relevant columns given on screen and click the **SAVE** button for saving the record. Branch selected in column "**Customer's Preferred Branch**"will be able to view the report for further processing, provided the MTF user has selected **Forwarded to Branch** option under column – **"Present status".** |

Options in column **Present Status** should be selected in following manner:

| Present status | How to use this option |
|---|---|
| Under canvassing | Select this option if lead is under canvassing/meeting/visits etc. |
| Forwarded to Branch | Select this option when customer is ready to contact/ visit branch for branch level process/ account opening. |
| Not materialized | Select this option where contacted lead would not be materialized. |

Punched record will locked on clicking **Save** in following stages.

| Present Status | Record Lock position |
|---|---|
| Under Canvassing | Remains unlocked for edit |
| *Forwarded to branch* | Locked |
| Not materialized | Locked |

Once the lead is forwarded to branch, MTF user cannot modify the punched lead data and Locked icon will be visible in View Mode against that record. In rare cases, when there is need to update mobile no. /address etc. , it can be done by only after unlocking of record. For unlocking the record, MTF user has to submit request to RO Admin user. Once the RO user unlocks the record, the locked Icon will change to Unlocked position. Then user can modify the record by using option- **Marketing**> **Modify Leads.**

Click **View** button to view all leads. User can also apply various filters (i.e. Product type, Product Sub type, Application stage, Status, Dates) to view filtered records. Click on **Unlocked** Icon shown under **Marketing** column displayed against selected record. It will open lead data entry screen for modification. Update required columns at marketing screen (left side) and click the **SAVE** button for saving the record.

User can view all records or filtered records by applying various filters available on screen. User can also **download** records in **Excel file** for further sorting/filtering purpose by clicking **Excel icon** within portal.

Under **Reports** Option, user can also print report using **Printer icon** within portal.

**Branch User**

Preferred branch opted by customer and punched by marketing staff in portal, will view the lead pending for further action at marketing portal. Branch will update the portal when lead is converted into business i.e. account is opened, under process or rejected for any reasons.

**Branch(BO) User Process:**

- Open marketing portal **http://ditportals.cbi.co.in/marketing**
- Login to portal with Emp. No. and windows/HRMS password.
  (User can see the logged in user name and user type at top right of screen after login. For punching branch level information, user type must be- **Branch Sanctioning Authority)**
- Go to Menu option: **Branches> Appraise Leads:** It will open **Lead-ADD** screen. Click **View** button to view all leads forwarded to the branch. User can also apply various filters (i.e. Product type, Product Sub type, Application stage, Status, Dates) to view filtered records. Click on **Unlocked** Icon shown under

**Branches** column displayed against selected record. It will open lead data entry screen for branch person. Enter relevant columns at branch screen (right side) and click the **SAVE** button for saving the record.

Options in column **Application Stage** should be selected in following manner:

| **Application Stage** | **How to use this option** |
|---|---|
| Application Received | Select this option when customer has submitted application to branch for deposit/loan. |
| Under Process | Select this option when application is under process with branch. |
| Deposit Account Opened | Select this option when Deposit account has been opened. User has to fill Deposit account number and other relevant given columns. Columns available on screen for feeding, depends on selected Application stage. |
| Loan Sanctioned | Select this option when Loan account has been opened. User has to fill Loan account number and other relevant given columns. |
| Loan Disbursed | Select this option when first disbursement is made in Loan account. Subsequent disbursements are not required to be punched at portal. Also punch the disbursement date and amount of first disbursal. |
| Rejected | Select this option when branch would not process the lead due to non- eligibility or other valid reasons. In this case reason of rejection is also to be punched. |
| Application not Received | Select this option when customer has not submitted application to branch within the expected period/defined period set by department. |

Punched record will locked on clicking **Save** in following stages.

| **Application Stage** | **Lock position** |
|---|---|
| Application Received | Remains unlocked for edit |
| Under Process | Remains unlocked for edit |
| Deposit Account Opened | Locked |
| Loan Sanctioned | Remains unlocked for edit |
| Loan Disbursed | Locked |
| Rejected | Locked |
| Application not Received | Locked |

Locked icon will be visible in View Mode against that record. In rare cases, for unlocking the record, MTF user has to submit request to RO Admin user. Once the RO user unlocks the record, the locked Icon will change to Unlocked position. Then user can modify the record by using option>**Branches> Modify Leads.**

Click **View** button to view all leads. User can also apply various filters (i.e. Product type, Product Sub type, Application stage, Status, Dates) to view filtered records. Click on **Unlocked** Icon shown under **Branches** column displayed against selected record. It will open lead data entry screen for modification for branch. Update required columns at branch screen (right side) and click the **SAVE** button for saving the record.

User can view all records or filtered records by applying various filters available on screen. User can also **download** records in **Excel file** for further sorting/filtering purpose by clicking

| | |
|---|---|
| | **Excel icon** within portal.<br><br>Under **Reports** Option, user can also print report using **Printer icon** within portal. |
| **RO User** | RO user will view/generate reports/MIS from portal for monitoring & follow up purpose. This user may unlock the record on request by MTF/Branch user for necessary updation in submitted information, by mentioning in Remarks Column. Portal users will be created/ activated/ deactivated by RO Admin user, based on the information submitted by branches. |
| **ZO User** | ZO user will view/generate reports/MIS from portal for monitoring & follow up purpose. |
| **CO User** | CO user will view/generate reports/MIS for monitoring & follow up purpose. RO/ZO level Portal Admin users will be created/ activated/ deactivated by CO user, based on the information submitted by Region/Zone. |

## Fields/ Information to be punched by Marketing Staff.

| Name of Person contacted | Address of place visited | Mobile No. | Preferred Product Type | Preferred Product Sub type | Description when product type as 'Others' is selected |
|---|---|---|---|---|---|
| | | | Deposit<br>Loan<br>Other Products | Saving<br>Current<br>RD<br>Other Deposit<br>Housing Loan<br>Vehicle Loan<br>Personal Loan<br>Cent Trade<br>Cent Mortgage<br>Education Loan<br>MSME<br>Others | |

| Lead amount | Customer's Preferred Branch | Present status | Next steps to be taken | Revisited date | Remarks by the Marketing Officer | Higher Office (RO/ZO/CO) Remarks |
|---|---|---|---|---|---|---|
| | | Under canvassing<br>Forwarded to Branch<br>Not materialized | | | | |

## Fields/ Information to be punched by Branch Staff.

| Application Received Date | Application Stage | Reason, in case of rejection | Amount applied | Account No. | CBS Product Code of Account Opened | CBS Product Description of Account Opened |
|---|---|---|---|---|---|---|
| | Application Received<br>Under Process<br>Deposit Account Opened<br>Loan Sanctioned<br>Loan Disbursed<br>Rejected | | | | This will be auto populated from CBS data in next | This will be auto populated from CBS data in next days |

| | | | | | | |
|---|---|---|---|---|---|---|
| | Application not Received | | | | days | |

| **Date of Loan Sanctioned/ Deposit mobilised** | **Amount of Loan Sanctioned/ Deposit mobilised** | **Date of Disbursement** | **Amount of Disbursement** | **Remarks** |
|---|---|---|---|---|
| | | | | |

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