



USER MANUAL FOR LEAD GENERATION

VERSION 1.2

Revision history:

Version	Author	Date	Remarks
V1.0	TCS	03-APR-18	Initial version
V1.1	TCS	16-Aug-21	Insurance, Mutual Funds and Current Account Opening Module added 2 Loan type added under Loan
V1.2	TCS	12-Oct-21	All options of Loan, CASA and Insurance are described
V1.3	TCS	30-Mar-23	Changes related to CRM Integration of Loan and Current Account Opening Leads.

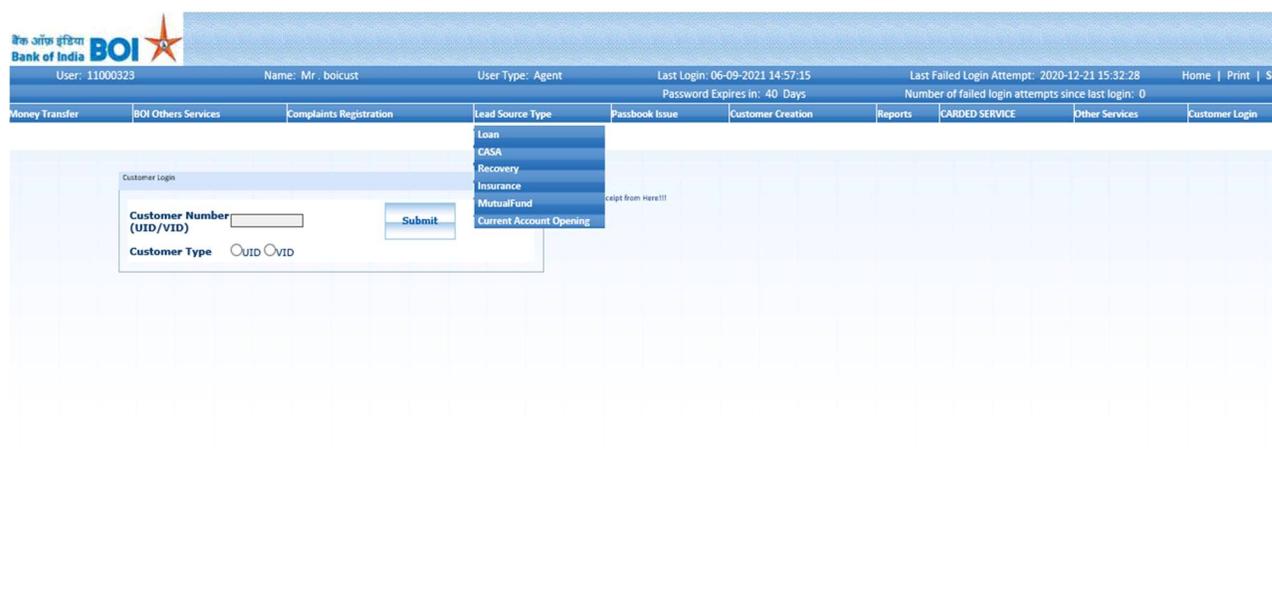
Description:

This module is applicable mainly for BC agents. The module is required to log the offline activities done by the BC agents. Using the module, the offline activities will be logged at FIG and will be approved by branch once BC submits the hard copies of documents.

The Leads submitted by BC Agents will be directly sent to Bank's CRM system. Branches are required to Authorize the Leads through Bank's CRM Portal.

Note: As per FI HO instructions, currently CASA, Recovery, Insurance and Mutual Funds Leads are not available from BC Portal.

Step 1: Click on Lead Source Type to submit details of Loan, CASA, Recovery, Insurance, Mutual Funds and Current Account Opening.



Step 2: For Loan request, Click on Loan in Lead Source Type menu. Loan type can be one of the following. Choose accordingly.

- Housing Loan
- Personal Loan
- **Kisan Credit Card**
- **Dairy**
- Vehicle Loan
- BOI Gold Loan
- StandUp India
- **Mudra (Shishu, Tarun, Kishore)**

After choosing appropriate loan type, fill details as given below and submit the request.

1. **Housing Loan:** Fill all the mandatory details as given below and submit the request.

Loan Details

Loan type : *	<input type="text" value="Housing Loan"/>
Title Salutation : *	<input type="text" value="Ms."/>
First Name : *	<input type="text" value="ABCD"/>
Last Name : *	<input type="text" value="EFGH"/>
Present address : *	<input type="text" value="XYZ"/>
Mobile Number : *	<input type="text" value="6846545222"/>
Amount Requested : *	<input type="text" value="100"/>
Lead source accepted in bank by : *	<input type="text" value="Branch Manager"/>

 Fields marked with * are mandatory

After filling the details choose the lead source accepted in bank person from drop down list as following:

Lead source accepted in bank by : *

Branch Manager
Area Manager
Credit officer
Zonal manager

 Fields marked with * are

After clicking submit button for successful response following page will appear.

Lead Generation Details

Loan Receipt

CRM Lead Id : 28123
Customer Name : Ramesh Singh
Mobile Number : 7251057302
Product Name : STAR HOME LOAN
Product Category name : Retail
Created Date : 14/02/2023
Amount : 1000
KO Id : 11000127
KO Name : VARSHA MASURKAR

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Note: After successful submission of Housing loan lead into BC portal. Housing loan lead details will be moved to **CRM Next Portal** under respective Branch work list for authorization of the same. BC agent has to follow up with their respective branch for Authorization of the Lead.

2. **Personal Loan:** Fill all the mandatory details as given below and submit the request.

Loan Details

Loan type : *	Personal Loan <input type="button" value="v"/>
Title Salutation : *	Mrs. <input type="button" value="v"/>
First Name : *	<input type="text" value="abcd"/>
Last Name : *	<input type="text" value="kldujf"/>
Present address : *	<input type="text" value="jkhdsfkj"/>
Mobile Number : *	<input type="text" value="9767548656"/>
Amount Requested : *	<input type="text" value="1000"/>
Lead source accepted in bank by : *	Branch Manager <input type="button" value="v"/>

 Fields marked with * are mandatory

After filling the details choose the lead source accepted in bank person from drop down list as following:

Lead source accepted in bank by : *

 Fields marked with * are

Branch Manager
Area Manager
Credit officer
Zonal manager

After clicking submit button for successful response following page will appear.



Lead Generation Details

Loan Receipt

CRM Lead Id : 28174
Customer Name : Prachi
Mobile Number : 8374893479
Product Name : STAR PERSONAL LOAN
Product Category name : Retail
Created Date : 14/02/2023
Amount : 10000000
KO Id : 11000127
KO Name : VARSHA MASURKAR

Note: After successful submission of Personal loan lead into BC portal. Personal loan lead details will be moved to CRM Next Portal under respective Branch work list for authorization of the same. BC agent has to follow up with their respective branch for Authorization of the Lead.

3. **Kisan Credit Card:** Fill all the mandatory details as given below and submit the request.

Loan Details

Loan type : *	Kisan Credit Card
Title Salutation : *	Ms.
First Name : *	ABCD
Last Name : *	EFGH
Present address : *	XYZ
Mobile Number : *	8732984798
Amount Requested : *	1000
Lead source accepted in bank by : *	Branch Manager

 Fields marked with * are mandatory

After filling the details choose the lead source accepted in bank person from drop down list as following:

Lead source accepted in bank by : *

 Fields marked with * are

- Branch Manager
- Area Manager
- Credit officer
- Zonal manager

After clicking submit button for successful response following page will appear.

Lead Generation Details

Loan Receipt

CRM Lead Id : 28172
Customer Name : S
Mobile Number : 7456487888
Product Name : Kisan Credit Card
Product Category name : Agriculture
Created Date : 14/02/2023
Amount : 10
KO Id : 11000127
KO Name : VARSHA MASURKAR

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Note: After successful submission of Kisan Credit Card lead into BC portal. Kisan Credit Card lead details will be moved to CRM Next Portal under respective Branch work list for authorization of the same. BC agent has to follow up with their respective branch for Authorization of the Lead.

4. **Dairy:** Fill all the mandatory details as given below and submit the request.

Loan Details

Loan type : *

Title Salutation : *

First Name : *

Last Name : *

Present address : *

Mobile Number : *

Amount Requested : *

Lead source accepted in bank by : *

 Fields marked with * are mandatory

After filling the details choose the lead source accepted in bank person from drop down list as following:

Lead source accepted in bank by : *

 Fields marked with * are

- Branch Manager
- Area Manager
- Credit officer
- Zonal manager

After clicking submit button for successful response following page will appear.



Lead Generation Details

Loan Receipt

CRM Lead Id : 28173
Customer Name : sdfgfg90 hgjhkgj
Mobile Number : 8978761398
Product Name : Dairy
Product Category name : Agriculture
Created Date : 14/02/2023
Amount : 2000
KO Id : 11000127
KO Name : VARSHA MASURKAR

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Note: After successful submission of Dairy lead into BC portal. Dairy lead details will be moved to CRM Next Portal under respective Branch work list for authorization of the same. BC agent has to follow up with their respective branch for Authorization of the Lead.

5. **Vehicle Loan:** Fill all the mandatory details as given below and submit the request.

Loan Details

Loan type : *	Vehicle Loan
Title Salutation : *	M/s.
First Name : *	DSFD
Last Name : *	DSFF
Present address : *	EWR
Mobile Number : *	6575455555
Amount Requested : *	10000
Lead source accepted in bank by : *	Branch Manager

 Fields marked with * are mandatory

After filling the details choose the lead source accepted in bank person from drop down list as following:

Lead source accepted in bank by : *

Branch Manager
 Area Manager
 Credit officer
 Zonal manager

 Fields marked with * are

After clicking submit button for successful response following page will appear.



Lead Generation Details

Loan Receipt

CRM Lead Id	: 28175
Customer Name	: Tejal Panchal
Mobile Number	: 7387548575
Product Name	: STAR VEHICLE LOAN
Product Category name	: Retail
Created Date	: 14/02/2023
Amount	: 1000
KO Id	: 11000127
KO Name	: VARSHA MASURKAR

Note: After successful submission of Vehicle loan lead into BC portal. Vehicle loan lead details will be moved to CRM Next Portal under respective Branch work list for authorization of the same. BC agent has to follow up with their respective branch for Authorization of the Lead.

6. **BOI GOLD Loan:** Fill all the mandatory details as given below and submit the request.

Loan Details

Loan type : *

Title Salutation : *

First Name : *

Last Name : *

Present address : *

Mobile Number : *

Amount Requested : *

Lead source accepted in bank by : *

i Fields marked with * are mandatory

After filling the details choose the lead source accepted in bank person from drop down list as following:

Lead source accepted in bank by : *

i Fields marked with * are mandatory

- Branch Manager
- Area Manager
- Credit officer
- Zonal manager

After clicking submit button for successful response following page will appear.



Lead Generation Details

Loan Receipt

CRM Lead Id : 28176
Customer Name : ABCD EFGH
Mobile Number : 9987582438
Product Name : Agriculture Gold Loan
Product Category name : Agriculture
Created Date : 14/02/2023
Amount : 100
KO Id : 11000127
KO Name : VARSHA MASURKAR

Note: After successful submission of BOI Gold loan lead into BC portal. BOI Gold loan lead details will be moved to CRM Next Portal under respective Branch work list for authorization of the same. BC agent has to follow up with their respective branch for Authorization of the Lead.

7. **Stand-up India Loan:** Fill all the mandatory details as given below and submit the request.

Loan Details

Loan type : *	<input type="text" value="StandUp India"/>
Title Salutation : *	<input type="text" value="Ms."/>
First Name : *	<input type="text" value="yrrty"/>
Last Name : *	<input type="text" value="rtyrty"/>
Present address : *	<input type="text" value="estrt"/>
Mobile Number : *	<input type="text" value="7865756544"/>
Amount Requested : *	<input type="text" value="100"/>
Lead source accepted in bank by : *	<input type="text" value="Branch Manager"/>

Fields marked with * are mandatory

After filling the details choose the lead source accepted in bank person from drop down list as following:

Lead source accepted in bank by : *

Branch Manager
Area Manager
Credit officer
Zonal manager

Fields marked with * are

After clicking submit button for successful response following page will appear.



Lead Generation Details

Loan Receipt

CRM Lead Id : 28171
Customer Name : Samiksha Sharma
Mobile Number : 9869390399
Product Name : Star Stand Up India Scheme
Product Category name : MSME
Created Date : 14/02/2023
Amount : 10
KO Id : 11000127
KO Name : VARSHA MASURKAR

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Note: After successful submission of Stand Up India loan lead into BC portal. Stand Up India loan lead details will be moved to CRM Next Portal under respective Branch work list for authorization of the same. BC agent has to follow up with their respective branch for Authorization of the Lead.

8. **Mudra Loan:** Fill all the mandatory details as given below and submit the request.

There are 3 types of Mudra Loan as below:

- a) Kishore Loan (For Amount Rs. 50000 to upto 5 Lacs)
- b) Shishu Loan (For Amount Upto Rs. 50000)
- c) Tarun Loans(For Amount 5 Lacs to 10 Lacs)

Loan Details

Loan type : *	Mudra
Mudra Loan : *	Kishore Loan
Title Salutation : *	Ms.
First Name : *	dskjfhjkfd
Last Name : *	kldajflkf
Present address : *	dlkjkf
Mobile Number : *	9743678465
Amount Requested : *	10000
Lead source accepted in bank by : *	Branch Manager

 Fields marked with * are mandatory

Submit

Clear

Loan Details

Loan type : *	Mudra
Mudra Loan : *	Shishu Loan
Title Salutation : *	Dr.
First Name : *	frt
Last Name : *	etret
Present address : *	ewtt
Mobile Number : *	8797666544
Amount Requested : *	1000
Lead source accepted in bank by : *	Branch Manager

 Fields marked with * are mandatory

Submit

Clear

Loan Details

Loan type : *

Mudra Loan : *

Title Salutation : *

First Name : *

Last Name : *

Present address : *

Mobile Number : *

Amount Requested : *

Lead source accepted in bank by : *

i Fields marked with * are mandatory

After filling the details choose the lead source accepted in bank person from drop down list as following:

Lead source accepted in bank by : *

i Fields marked with * are

Branch Manager

Area Manager

Credit officer

Zonal manager

After clicking submit button for successful response following page will appear.

Lead Generation Details

Loan Receipt

CRM Lead Id : 28169
Customer Name : Bhupi Patidar
Mobile Number : 8356092913
Product Name : Kishore Loan (Rs. 50000 to upto 5 Lacs)
Product Category name : MSME
Created Date : 14/02/2023
Amount : 50000
KO Id : 11000127
KO Name : VARSHA MASURKAR

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Lead Generation Details

Loan Receipt

CRM Lead Id : 28164
Customer Name : Varsha Masurkar
Mobile Number : 9987572881
Product Name : Shishu Loan (Upto Rs. 50000)
Product Category name : MSME
Created Date : 14/02/2023
Amount : 10
KO Id : 11000127
KO Name : VARSHA MASURKAR

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Lead Generation Details

Loan Receipt

CRM Lead Id	: 28170
Customer Name	: Ritesh Dubey
Mobile Number	: 9870660856
Product Name	: Tarun Loans(5 Lacs to 10 Lacs)
Product Category name	: MSME
Created Date	: 14/02/2023
Amount	: 500000
KO Id	: 11000127
KO Name	: VARSHA MASURKAR

Note: After successful submission of Mudra loan lead into BC portal. Mudra loan lead details will be moved to CRM Next Portal under respective Branch work list for authorization of the same. BC agent has to follow up with their respective branch for Authorization of the Lead.

Step 3: For **CASA** request, Click on CASA in Lead Source Type menu. Select the appropriate CASA type from drop down list as shown below.

- CAA
- SBA

After selecting proper CASA type from list, fill the CASA details as shown below.

CASA Details

CASA type : *	CAA ▾
Applicant/ Beneficiary name : *	Ritesh Dubey
Present address : *	Kalyan Thane Mumbai ⬆
Mobile Number : *	8979416513
Amount Requested : *	241550 ✕
Lead source accepted in bank by : *	Branch Manager ▾

Fields marked with * are mandatory

CASA Details

CASA type : *	SBA ▾
Applicant/ Beneficiary name : *	Ritesh Dubey
Present address : *	Kalyan Thane Mumbai ⬆
Mobile Number : *	8941651656
Amount Requested : *	32000
Lead source accepted in bank by : *	Area Manager ▾

Fields marked with * are mandatory

After clicking submit button for successful response following page will appear.

Lead Management System (LMS) Details are collected successfully with Reference no : 1100032317725904500328435892. Retain the Reference no for future use. LMS Details waiting for approval

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Note: After successfully submission of CASA details into BC portal. Lead details will be moved to respective agent Branch work list under “LMS Approval” menu in FI TCS BRANCH admin portal

for authorization the same. BC agent has to follow up with their respective branch for Authorization of the same.

Step 4: For **Recovery**, click on Recovery option in Lead Source Type menu and fill all the mandatory details and submit the request.

Recovery Details

Applicant/ Beneficiary name : *

Complete address : *

Mobile Number : *

Amount Recovered : *

Account Number : *

Lead source accepted in bank by : *

Fields marked with * are mandatory

After clicking submit button for successful response following page will appear.

Lead Management System (LMS) Details are collected successfully with Reference no : 1100032317625904198138248230. Retain the Reference no for future use. LMS Details waiting for approval

Note: After successfully submission of Recovery details into BC portal. All details lead details will be moved to respective agent Branch work list under “LMS Approval” menu in FI TCS BRANCH admin portal for authorization the same. BC agent has to follow up with their respective branch for Authorization of the same.

Step 5: For Insurance, click on Insurance option in Lead Source Type menu. Insurance Service type can be one of the following. Choose accordingly.

- Life Insurance
- Health Insurance
- Motor Insurance



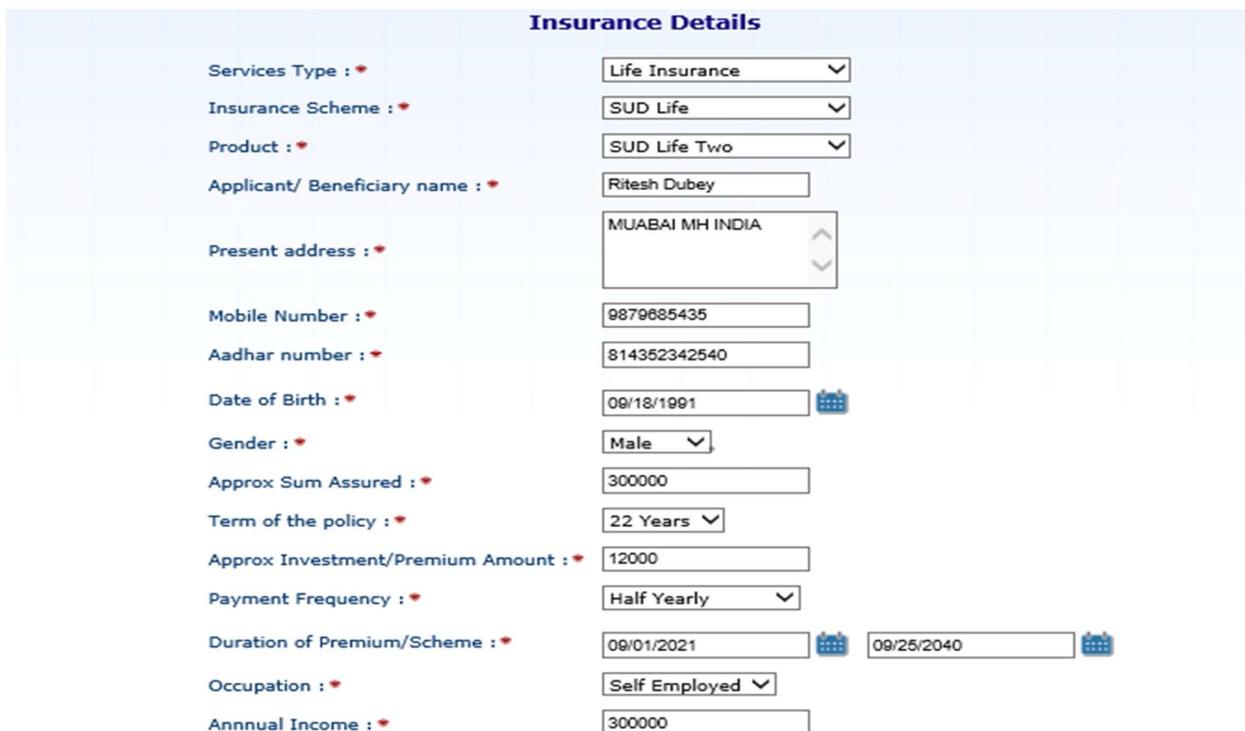
Insurance Details

Services Type : *

Applicant/ Beneficiary name : *

Life Insurance
Health Insurance
Motor Insurance
-----Select-----

After choosing appropriate Insurance service type fill all mandatory details as given below and submit the request.



Insurance Details

Services Type : * Life Insurance

Insurance Scheme : * SUD Life

Product : * SUD Life Two

Applicant/ Beneficiary name : * Ritesh Dubey

Present address : * MUABAI MH INDIA

Mobile Number : * 9879685435

Aadhar number : * 814352342540

Date of Birth : * 09/18/1991

Gender : * Male

Approx Sum Assured : * 300000

Term of the policy : * 22 Years

Approx Investment/Premium Amount : * 12000

Payment Frequency : * Half Yearly

Duration of Premium/Scheme : * 09/01/2021 09/25/2040

Occupation : * Self Employed

Annual Income : * 300000

Occupation : *	Self Employed ▾
Annual Income : *	300000
Existing Bank Of India Customer : *	No ▾
Life Insurance Requirement : *	Retirement ▾
Any Medical adversity : *	No ▾
Existing Insurance : *	No ▾
Annual Premium : *	240000
Insurance Policy required for : *	Self ▾
Lead source accepted in bank by : *	Branch Manager ▾

 Fields marked with * are mandatory

<input type="button" value="Submit"/>	<input type="button" value="Clear"/>
---------------------------------------	--------------------------------------

Insurance Details

Services Type : *	Health Insurance ▾
Insurance Scheme : *	Star Health & Allied Insurance Company Limited ▾
Product : *	Star Health ▾
Applicant/ Beneficiary name : *	Ritesh Dubey
Present address : *	Klayna Thane
Mobile Number : *	9879646546
Aadhar number : *	123456789693
Date of Birth : *	10/07/1994 
Approx Sum Assured : *	500000
Name of the Spouse :	
Name of First Child :	
Name of Second Child :	
Approx Investment/Premium Amount : *	2000
Payment Frequency : *	Half Yearly ▾
Duration of Premium/Scheme : *	10/01/2021  10/30/2035 
Account Number : *	321545848451515
Lead source accepted in bank by : *	Branch Manager ▾

 Fields marked with * are mandatory

<input type="button" value="Submit"/>	<input type="button" value="Clear"/>
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Insurance Details

Services Type : *	<input type="text" value="Motor Insurance"/>	
Insurance Scheme : *	<input type="text" value="Bajaj Allianz General Insurance"/>	
Product : *	<input type="text" value="Two Wheeler"/>	
Applicant/ Beneficiary name : *	<input type="text" value="Ritesh Dubey"/>	
Present address : *	<input type="text" value="Thane Maharashtra"/>	
Mobile Number : *	<input type="text" value="8798461565"/>	
Aadhar number : *	<input type="text" value="987984616512"/>	
Date of Birth : *	<input type="text" value="10/05/1994"/>	
Approx Sum Assured : *	<input type="text" value="20000"/>	
Approx Investment/Premium Amount : *	<input type="text" value="2000"/>	
Payment Frequency : *	<input type="text" value="Quarterly"/>	
Duration of Premium/Scheme : *	<input type="text" value="10/07/2021"/>	<input type="text" value="10/21/2030"/>
Account Number : *	<input type="text" value="345757575875568"/>	
Type of vehical : *	<input type="text" value="Three Wheeler"/>	
Model :	<input type="text"/>	
Registration number : *	<input type="text" value="MH23SD3456"/>	
Chasis number :	<input type="text"/>	
Chasis number :	<input type="text"/>	
Engine number :	<input type="text"/>	
Date of purchase of vehicle : *	<input type="text" value="02/04/2021"/>	
Policy Type : *	<input type="text" value="New"/>	
Lead source accepted in bank by : *	<input type="text" value="Branch Manager"/>	

 Fields marked with * are mandatory

After clicking submit button for successful response following page will appear.

Lead Management System (LMS) Details are collected successfully with Reference no : 1100032325927725010708633764. Retain the Reference no for future use. LMS Details waiting for approval

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Note: After successfully submission of Insurance details into BC portal. Lead details will be moved to respective agent Branch work list under “LMS Approval” menu in FI TCS BRANCH admin portal for authorization the same. BC agent has to follow up with their respective branch for Authorization of the same.

Step 6: For **Mutual Funds**, click on others : option in Lead Source Type menu.

Mutual funds page will appear, then kindly enter all mandatory fields. Then click on Submit button.

Other Services

Other Services Type : *	Mutual Fund
Name of the Mutual Fund Scheme : *	ICICI
Applicant/ Beneficiary name : *	Ritesh Dubey
Present address : *	BELAPUR NAVI MUMBAI
Mobile Number : *	9879685435
Aadhar number : *	814352342540
Date of Birth : *	09/05/1995
Gender : *	Male
Approx Investment/Premium Amount : *	12000
Payment Frequency : *	Monthly
Duration of Premium/Scheme : *	09/01/2021 09/28/2029
Account Number : *	000310100021583
Lead source accepted in bank by : *	Branch Manager

 Fields marked with * are mandatory

After clicking submit button for successful response following page will appear.

Lead Management System (LMS) Details are collected successfully with Reference no : 1100032325927725010708633764. Retain the Reference no for future use. LMS Details waiting for approval

Back

Note: After successfully submission Mutual Funds details into BC portal. Lead details will be moved to respective agent Branch work list under “LMS Approval” menu in FI TCS BRANCH admin portal for authorization the same. BC agent has to follow up with their respective branch for Authorization of the same.

Step 7: For Current Account Opening, click on Current Account Opening option in Lead Source Type menu.

Current Account Opening page will appear, then kindly enter all mandatory fields. Then click on Submit button.

Current Account Opening

Title Salutation : *	M/s. ▾
First Name : *	rteg
Last Name : *	reygrt
Present address : *	fdgfgfg
Mobile Number : *	9796786554
Gender : *	Other ▾
Customer Id (if existing customer of BOI):	
Current Account Number :	
Date of Account opening : *	03/01/2023
PAN or Form60/61	<input checked="" type="radio"/> PAN <input type="radio"/> Form60/61
PAN number : *	brupm2145j
Lead source accepted in bank by : *	Branch Manager ▾

Fields marked with * are mandatory

After clicking submit button for successful response following page will appear.



Lead Generation Details

Account Receipt

CRM Lead Id	: 32587
Customer Name	: Aishvarya S
Mobile Number	: 7020401925
Product Name	: CD
Product Category name	: Resource Mobilization
Account Opening Date	: 10/04/2023
Created Date	: 10/04/2023
KO Id	: 11000127
KO Name	: VARSHA MASURKAR

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Note: After successful submission of Current Account Opening lead into BC portal. Current Account Opening lead details will be moved to CRM Next Portal under respective Branch work list for authorization of the same. BC agent has to follow up with their respective branch for Authorization of the Lead.

Note: There is Duplication check on mobile number of the Customer in CRM. 1 Mobile number per customer per Loan is accepted.

If the Mobile number is repeated for the same Loan , then below error message will be displayed on the Screen.

Lead Already Exist - -1
Loan Details

Loan type : *	<input type="text" value="-----Select-----"/>
Title Salutation : *	<input type="text" value="---Select--"/>
First Name : *	<input type="text"/>
Last Name : *	<input type="text"/>
Present address : *	<input type="text"/>
Mobile Number : *	<input type="text"/>

A customer will be eligible to apply for the same Loan only if his existing Loan Request is recovered completely or Rejected at any stage in Approvals.

THANK YOU