

NBA for Retail Banking with TCS CKP

End User Manual

Version 1.0

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Steps to Configure NBA for Retail Banking with TCS CKP

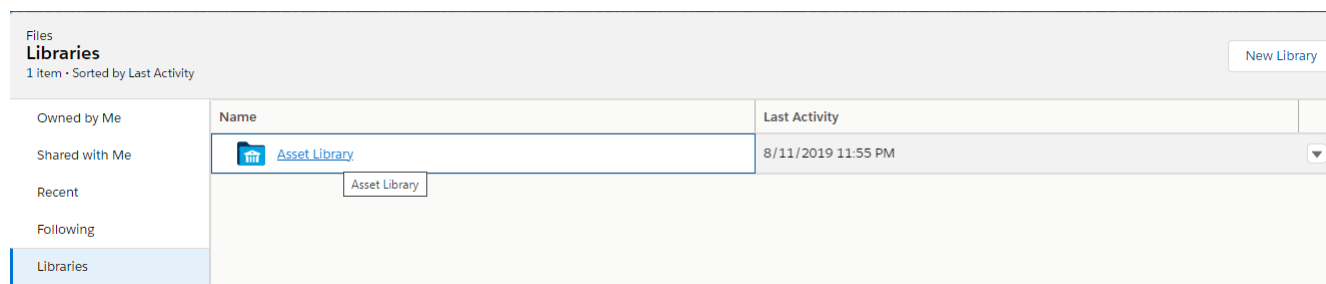
Step 1: Install the Managed Package

Go to AppExchange → Search NBA for Retail Banking with TCS CKP → Install

Step 2: Upload Recommendation images in Files

Images to be displayed on Recommendations can be saved to Asset Files:

1. Go to Files
2. Click on Libraries
3. Select Asset Library
4. Click “Upload Asset File” button
5. Select the file and check the checkbox for “Make asset file available to Salesforce org users”



6. Go to Setup
7. Quick find Asset Files
8. Select the file uploaded and copy the Salesforce Id
9. Keep this Id as it will need in custom setting

Step 3: Create Custom Setting Record

1. Go to “Custom Settings” under Setup
2. Search for “NBA CKP Custom Setting”
3. Open “NBA CKP Custom Setting”
4. Click “Manage” button
5. Click “Create New”

NBA CKP Custom Setting Detail

[Help for this Page](#)

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Edit			
Name	Default	Acceptance Label	Accept
CKP Base URL	http://[redacted]9/ckp2/service/Customer/	Fraud Protection Action	TCS_NBACKP__Fraud_Protection_Flow
Fraud Protection Image	03S [redacted]	Overdraft Action	TCS_NBACKP__Enroll_in_Overdraft_Protection
Overdraft Image	03S [redacted]	Overseas Action	TCS_NBACKP__Overseas_Card_Activation
Overseas Image	03S [redacted]	Rejection Label	No, Thanks!

Step 4: Create new Remote Site Setting record

1. Go to Setup
2. Quick find Remote Site Settings
3. Click Create New


SETUP
Remote Site Settings

Remote Site Edit

[Help](#)

Enter the URL for the remote site. All s-controls, JavaScript OnClick commands in custom buttons, Apex, and AJAX proxy calls can access this Web address from salesforce.com.

Remote Site Edit
Save Save & New Cancel

Remote Site Name
Remote Site URL
Disable Protocol Security ☐ [i](#)
Description
Active ☒

Save Save & New Cancel

Step 5: Create Named Credential

1. Go to Setup
2. Quick find Named Credential
3. Click Create New



SETUP

Named Credentials

Label

Name

URL

https://[redacted]service/Customer/

▼ Authentication

Certificate

Identity Type

Named Principal ▼

Authentication Protocol

AWS Signature Version 4 ▼

AWS Access Key ID

AWS Secret Access Key

AWS Region

AWS Service

▼ Callout Options

Generate Authorization Header

☒

Allow Merge Fields in HTTP Header

☐

Allow Merge Fields in HTTP Body

☐

Step 6: Add fields on page layout

1. Add custom fields on Contact Page Layout
 - Bank Persona (TCS_NBACKP__Bank_Persona__c)
 - CKP CustomerId (TCS_NBACKP__CKP_Customer_Id__c)

SETUP > OBJECT MANAGER
Contact

Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types

Save Quick Save Preview As... Cancel Undo Redo Layout Properties

Fields

Quick Find Field Name

Section	Asst. Phone	Contact Owner	Description	Fax	Individual
Blank Space	Bank Persona	Created By	Do Not Call	Fax Opt Out	Languages
Account Name	Birthdate	Data.com Key	Email	Fraud Protection ...	Last Modified By
Assistant	CKP Customer Id	Department	Email Opt Out	Home Phone	Last Stay-in-Touc...

Department Sample Text Fax 1-415-555-1212
Birthdate 1/18/2021 Email sarah.sample@company.com
Reports To Sample Text Assistant Sample Text
Lead Source Sample Text Asst. Phone 1-415-555-1212

TCS NBA CKP
Bank Persona Sample Text CKP Customer Id Sample Text

2. Add custom fields on Recommendation Page Layout

- Recommendation Category (TCS_NBACKP__Recommendation_Category__c)
- Recommendation Ranking (TCS_NBACKP__Recommendation_Ranking__c)

SETUP > OBJECT MANAGER
Recommendation

Details
Fields & Relationships
Page Layouts
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters

Save Quick Save Preview As... Cancel Undo Redo Layout Properties

Fields

Quick Find Field Name

Section	Description	Recommendation Ca...
Blank Space	Image	Recommendation Ra...
Acceptance Label	Is Action Active	Rejection Label
Action	Name	

Image Sample Text
Acceptance Label Sample Text
Rejection Label Sample Text

Is Action Active Sample Text

TCS NBA CKP
Recommendation Category Sample Text Recommendation Ranking Sample Text

Custom Links (Header visible on detail only)

Step 7: Sync Contacts for “CKP Customer Id”

Update Contacts in Salesforce for CKP Customer Id (TCS_NBACKP__Customer_Product__c). CKP customer Id is the Customer Identifier in CKP platform.

Ways to Sync to CKP

1. Manually – Get the data from CKP in excel or .csv files and upload it in Salesforce.

2. Automatically – Batch and Scheduler classes can be created which will hit CKP Platform APIs and can be updated the Customer information in Salesforce Objects.

Note – This application assumes that Customers (Contacts) are already synced with CKP and Contacts are populated with correct CKP Customer Ids.

Step 8: Update Contacts for “Bank Persona”

1. Identify the Contacts who should receive the Recommendations
2. Update “Bank Persona” (TCS_NBACKP__Bank_Persona__c) field on Contact as “Eyes on the Horizon”

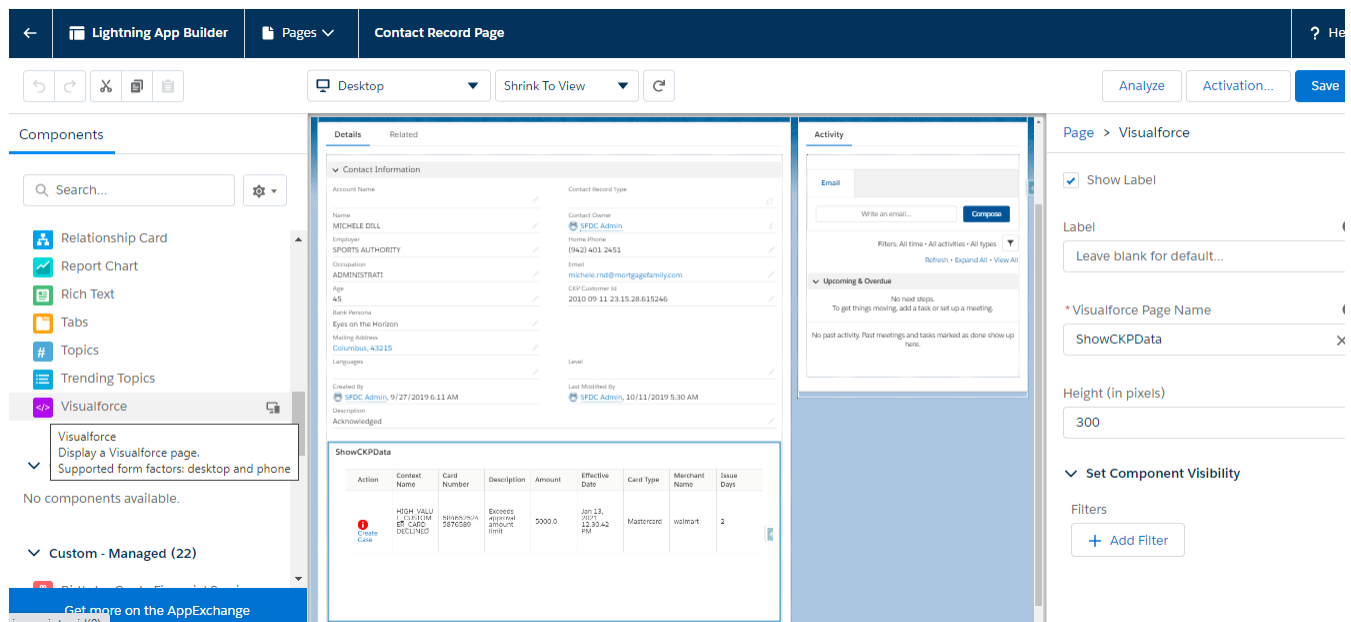
Note – This application works for the contacts with Bank Persona as “Eyes on the Horizon”.

Ways to update the Contacts

1. Manually
2. Data Loader/Data Import Wizard/ Any similar tool
3. List View

Step 9: Add “Current Issues” page on Contact Layout

1. Go to any Contact Record
2. Click on “Edit Page”
3. Add the Visualforce component on the page
4. Select “ShowCKPData” VF page



The screenshot displays the Salesforce Lightning App Builder interface for editing a Contact Record Page. The left sidebar lists available components, with 'Visualforce' selected. The main area shows the 'Details' tab of a contact record, including fields for personal and organizational information, contact details, and a 'ShowCKPData' table. The table has columns for Action, Contact Name, Card Number, Description, Amount, Effective Date, Card Type, Merchant Name, and Issue Days. A single row is visible with a red 'X' icon in the Action column. The right sidebar shows the configuration for the 'Visualforce' component, including a checkbox for 'Show Label', a text field for 'Label', a dropdown for 'Visualforce Page Name' (set to 'ShowCKPData'), a text field for 'Height (in pixels)' (set to '300'), and a section for 'Set Component Visibility' with a '+ Add Filter' button.

Step 10: Create Recommendation Records

Create Recommendation records as shown in the images. Please note the Recommendation Category and Recommendation Ranking.

1. Recommendation for Overdraft Protection

Edit Enroll in Overdraft Protection

* Name

Enroll In Overdraft Protection

* Description

Enroll In Overdraft Protection

Image 



* Action

Enroll In Overdraft Protection ▼

* Acceptance Label

Enroll

Is Action Active



* Rejection Label

No, Thanks!

TCS NBA CKP

Recommendation Category

Banking Products

Recommendation Ranking

1

Cancel

Save & New

Save

2. Recommendation for Fraud Protection

New Recommendation

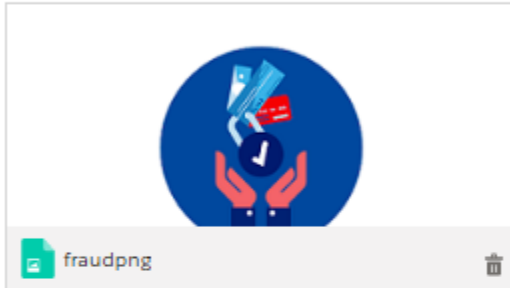
* Name

Fraud Protection Service

* Description

Fraud Protection Service

Image ⓘ



* Action

Fraud Protection Flow

* Acceptance Label

Accept

* Rejection Label

No, Thanks

TCS NBA CKP

Recommendation Category

Banking Services

Recommendation Ranking

3

Cancel

Save & New

Save

3. Recommendation for Overseas Card Activation

New Recommendation

* Name

Overseas Card Activation

* Description

Overseas Card Activation

Image ⓘ



* Action

Overseas Card Activation ▼

* Acceptance Label

Accept

* Rejection Label

No, Thanks!

TCS NBA CKP

Recommendation Category

Banking Tools

Recommendation Ranking

2

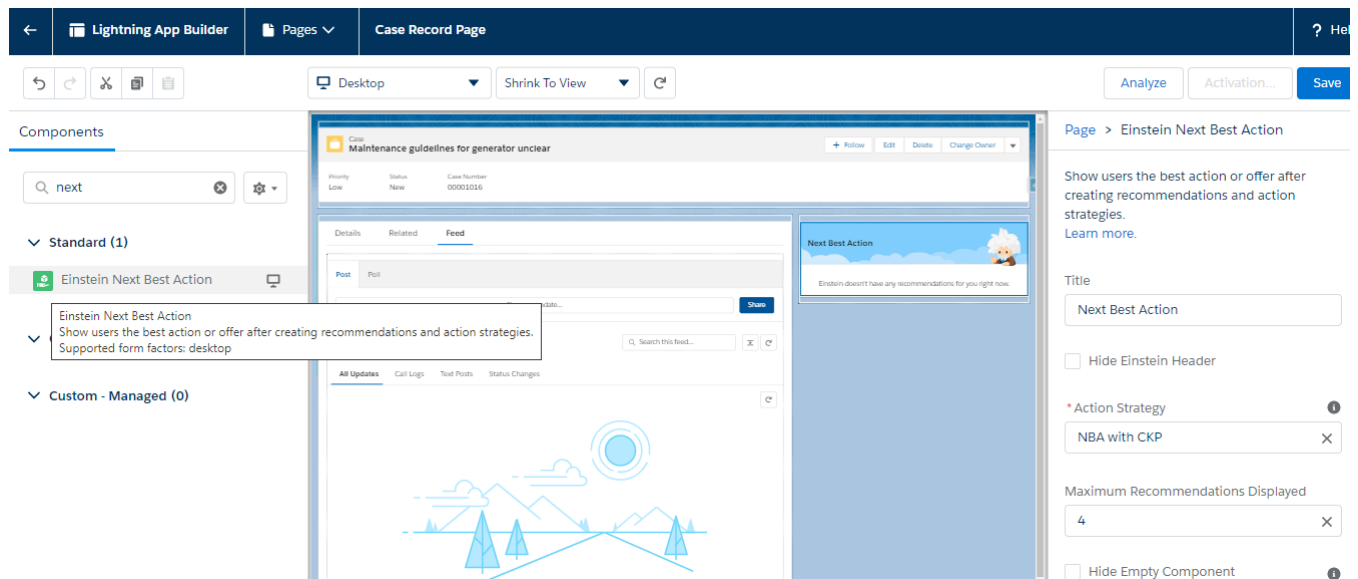
Cancel

Save & New

Save

Step 11: Add Next Best Action Component on Case Record Page

1. Go to any Case Record
2. Click on Edit Page
3. Add “Einstein Next Best Action” component on page
4. Configure it to show maximum 4 Recommendations



The screenshot shows the Lightning App Builder interface for editing a 'Case Record Page'. The top navigation bar includes 'Lightning App Builder', 'Pages', and 'Case Record Page'. The main workspace displays a preview of the case record page with a 'Next Best Action' component highlighted. The component's configuration panel on the right shows the following settings:

- Title:** Next Best Action
- ☐ Hide Einstein Header
- Action Strategy:** NBA with CKP
- Maximum Recommendations Displayed:** 4
- ☐ Hide Empty Component

The preview shows a case titled 'Maintenance guidelines for generator unclear' with a 'Next Best Action' section that currently displays 'Einstein doesn't have any recommendations for you right now.' The left sidebar shows the 'Components' list with 'Einstein Next Best Action' selected under the 'Standard' category.

Functional Flow

For a customer, if Propensity Score is between 60% and 80% and customer has a card decline issue in last 40 days then, he will see below recommendations based on the card decline reason .

1. **Card Decline for Insufficient Funds** – Customer will have recommendation to enroll for Overdraft Protection and download Budget Tool
2. **Card Decline with Suspected Fraud** – Customer will have the recommendation to Enroll in Fraud Protection Service
3. **Card Decline for International location** – Customer will have the recommendation for Overseas Card Activation.

Key Highlights

1. Ability to generate the recommendations based on the customer churn score and card decline reason from CKP platform for:
 - Download Budget Tool
 - Enroll for Fraud Protection
 - Enroll for Overdraft Protection
 - Enroll for Overseas Card Activation
2. Visibility of recent Card Decline issues from CKP right on the Contact detail page .
3. Ability to create the Salesforce case record from the Card Decline issue page itself.
4. App generates the recommendations based on the CKP data directly without saving the data in Salesforce.

CKP Platform APIs

1. **Current Issue**
<http://hostname/ckp2/service/Customer/<customerId>/hasCurrentIssue>
2. **Product Propensity**
<http://hostname/ckp2/service/Customer/<customerId>/hasPropensity>
3. **Basic Details**
<http://hostname/ckp2/service/Customer/<customerId>>
4. **Product Owned by Customer**
<http://hostname/ckp2/service/Customer/<customerId>/owns>
5. **Brand Affinity**
<http://hostname/ckp2/service/Customer/<customerId>/hasAffinityToBrand>
6. **Aspiration**
<http://hostname/ckp2/service/Customer/<customerId>/aspiresFor>
7. **Recommended Product**
<http://hostname/ckp2/service/Customer/<customerId>/hasRecommended>
8. **Locations**
<http://hostname/ckp2/service/Customer/<customerId>/many/homeLocation,preferredLocation,hasCurrentLocation>
9. **KPI**
<http://hostname/ckp2/service/Customer/<customerId>/KPI>
10. **Spending Habits**
<http://hostname/ckp2/service/Customer/<customerId>/spendByCategory>
11. **Active Devices**
<http://hostname/ckp2/service/Customer/<customerId>/activeDevices>
12. **Relationship**
<http://hostname/ckp2/service/Customer/<customerId>/many/WIFE,CHILD,GUARANTOR,FRIEND,GRAND-CHILD,HUSBAND,PARENT,DAUGHTER>
13. **Insights**
<http://hostname/ckp2/eio/insight/Customer/<customerId>/InsightModel>