



BankWorld ATM Customer Admin & Cardholder Queries

Customer administration and responding effectively to cardholder queries are important parts of any bank's operations.

This course looks in depth at the key customer-related operations a bank is likely to be involved in, and gives participants sufficient knowledge of the system to enable them to administer customers and handle cardholder queries.

This is a hands-on course that allows participants to practice some of the relevant tasks.



Benefits:

You will be able to handle new customer procedures, re-issue cards to existing customers and manage customer card accounts.

Having bank staff trained to do this will enable the bank to operate more efficiently and effectively, and that staff can provide excellent service to the bank's card customers.

Duration:

0.5 day (classroom-based)

Audience:

This course can be taken by anyone, but it is designed in particular for:

- ❖ Bank Operations staff
- ❖ Bank Customer Services staff

Location:

CR2 offices in Dublin, Dubai and Amman. Can also be run onsite on request.

Our training is a blend of classroom and online training and includes:

- Overviews
- Installation
- Configuration
- Operations
- Tools

For more information please email us at training@cr2.com.

www.cr2.com





Pre-requisites:

- ❖ Basic card knowledge and an understanding of terms such as 'card number', 'magnetic stripe', 'PIN', and 'card accounts'
- ❖ Basic understanding of existing Bank Card Centre
- ❖ You should have already attended the *BankWorld Channel Manager Operations* course
- ❖ Ideally you will have already attended the *BankWorld ATM Daily and Regular Operational Tasks* course

Objectives: At the end of this course you will be able to:

1. List the steps to add a customer in BankWorld
2. Use the CMS to re-issue cards
3. Use the CMS GUIs to search and verify customers
4. Search for transactions to deal with cardholder queries
5. Take actions such as change card status, block a card, reset PIN retry limits and change service restrictions on a card in response to cardholder queries and requests
6. Set up notifications and payment templates on a Customer / Customer User record

Course Outline:

- ❖ ATM System Components Overview
- ❖ New Customer Procedures
- ❖ Card Re-Issuing
- ❖ Customer Administration
- ❖ Cardholder Queries
- ❖ Course Exam

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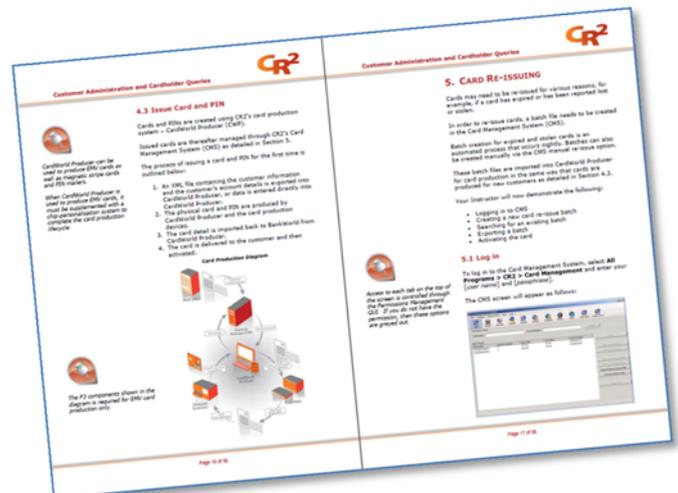
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Materials:

Course Participant Guide, Glossary, relevant User Guides, etc., supplied on Apple iPad¹ (or equivalent) or on USB key.



¹ Apple iPad (or equivalent) only supplied if course is undertaken at a CR2 office location.