



# BankWorld Mobile SMS System Operation

A bank deploying the BankWorld Mobile SMS channel will have to ensure the system adapts to their specific requirements and fits in with their operational procedures.

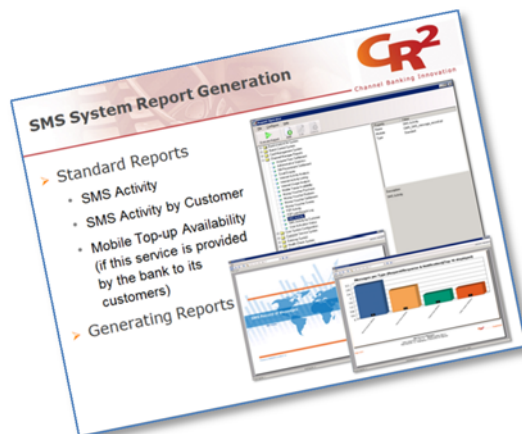
This course equips participants with sufficient confidence and in-depth knowledge of the regular tasks required to operate the Mobile SMS System and administer customers using this channel to ensure that the maximum benefit is derived from the system.

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

## Benefits:

You will be able to combine the SMS banking features with other BankWorld self-service channels to offer customers another channel to transact on and provide extra security with the system's comprehensive SMS notification options.

This knowledge will enable bank staff to operate the Mobile SMS system effectively and efficiently, and may also result in lower consultancy costs.



## Duration:

0.5 day (classroom-based)

## Audience:

This course is designed for the following audiences:

- ❖ Bank Operations staff

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](mailto:training@cr2.com).

[www.cr2.com](http://www.cr2.com)

## Location:

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





## Pre-requisites:

- ❖ *BankWorld Architectural Overview* eLearning course
- ❖ *BankWorld Channel Manager Operation* course
- ❖ *BankWorld Web Portal Operation* (if the Web Portal Channel is deployed with the SMS Channel)

## Objectives:

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

1. Edit a role to support SMS Channel-related administration
2. Update Customer User Records (e.g. change mobile numbers and enable and disable SMS notifications)
3. Set up SMS notifications by logging in as an Admin User
4. Assign notifications to Customer Types and Groups
5. Assign SMS notifications to Transaction Types
6. Search and look up details of the SMS Channel transactions
7. Discuss the notification portlet and how it is used by the SMS Channel
8. Enable a Bank Instruction on the SMS Channel
9. Edit payment templates to support mobile banking
10. Generate reports specific to the SMS Channel
11. Monitor SMS Gateway activities

## Course Outline:

- ❖ SMS System Overview
- ❖ SMS System operation Summary
- ❖ SMS Channel Roles Management
- ❖ Customer Administration
- ❖ View SMS Channel Transaction Details
- ❖ Notification Management
- ❖ SMS Transaction Type Administration
- ❖ SMS Bank Instruction Administration
- ❖ Payment Template Maintenance
- ❖ SMS Report Generation
- ❖ SMS Monitoring
- ❖ Course Exam

## Materials:

Course Participant Guide, Course handouts / diagrams, Glossary, relevant User Guides, etc., supplied on Apple iPad<sup>1</sup> (or equivalent) or on USB key.

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