



Dynamics 365 Banking Accelerator Test Drive Guide

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Table of Contents

Solution overview 3

Installing the Banking Accelerator Test Drive 3

Start A Test Drive 5

Known Error Messages..... 5

Personas..... 6

Walkthrough the Customer Journey 6

 Step 1: The customer’s first touch – your company’s website..... 6

 Step 2: The customer visits your bank 9

 Step 3: The customer seamlessly refinances her home 13

 Step 4: The customer easily applies for business loan 14

 Step 4: Building customer relationships 18

 Step 5: Your customers are always supported..... 19

 Step 6: Happy customer = future business & referrals 19

Solution overview

The Microsoft Dynamics 365 Banking Accelerator is a solution released to sit on top of an existing Dynamics instance and assist with day to day banking operations. The solution has been split into both Retail and Commercial banking and can be implemented with one or both. The Accelerator contains installable solutions that include standard entity attribute extensions, new banking entities, pre-built dashboards, workflows, sample data as well as other tools to help customers and partners build and deploy new banking solutions.

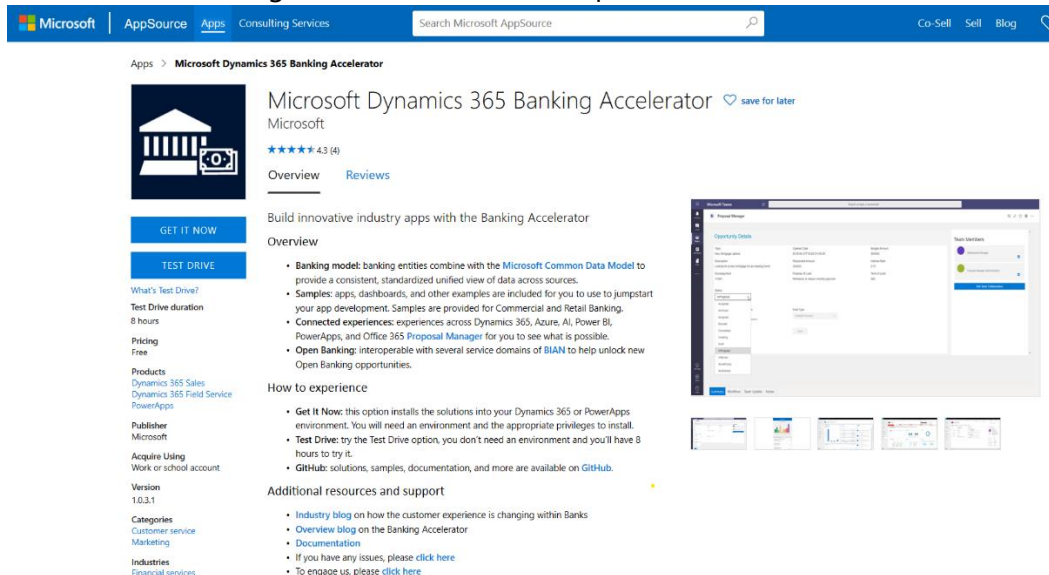
This documentation provides a walkthrough of the key dashboards and flows within the Banking solutions.

Installing the Banking Accelerator Test Drive

*Please note this Test Drive:

- May include capabilities not yet available for download
- Is read-only
- Is limited in duration

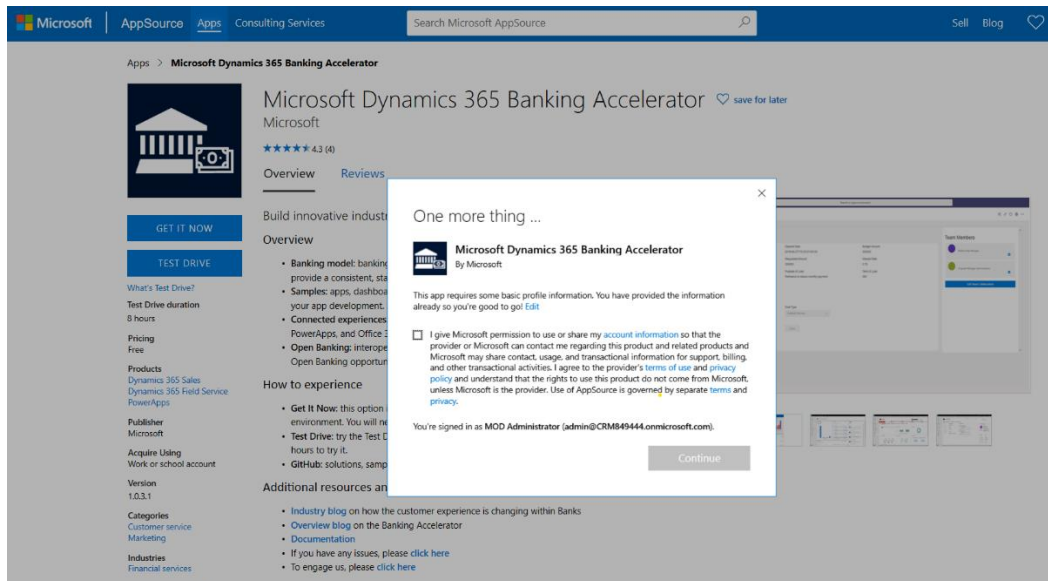
To install the Banking Accelerator, follow this process:



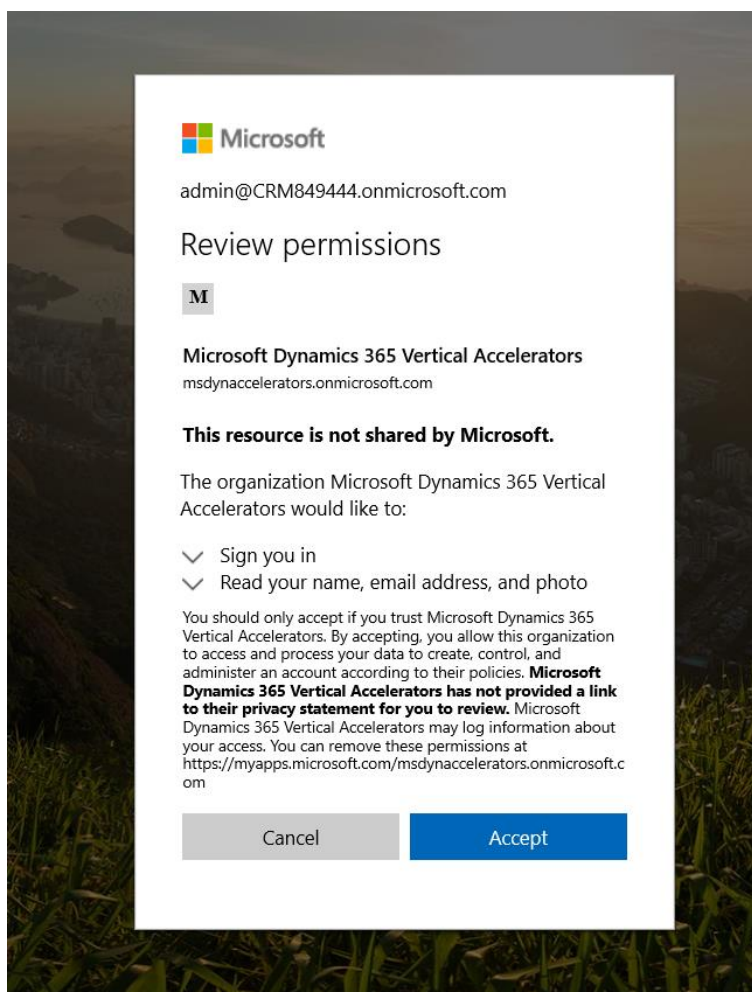
The screenshot shows the Microsoft AppSource page for the Microsoft Dynamics 365 Banking Accelerator. The page has a blue header with the Microsoft logo and navigation links. The main content area features a large image of a building with a bank sign, the app's name, and a 'GET IT NOW' button. Below this is a 'TEST DRIVE' button, which is highlighted. To the right of the 'TEST DRIVE' button is a section titled 'What's Test Drive?' with details about the test drive duration (8 hours), pricing (Free), and products (Dynamics 365 Sales, Dynamics 365 Field Service, PowerApps). Further right is a section titled 'Build innovative industry apps with the Banking Accelerator' with an 'Overview' tab. This section lists key features: Banking model, Samples, Connected experiences, and Open Banking. Below this is a 'How to experience' section with three options: Get It Now, Test Drive, and GitHub. At the bottom is an 'Additional resources and support' section with links to an industry blog, overview blog, documentation, and a link to engage with support.

- Select the **Test Drive button** for the Banking Accelerator from [AppSource](#). Sign in.

Microsoft Banking Accelerator Walkthrough (March 5, 2020)



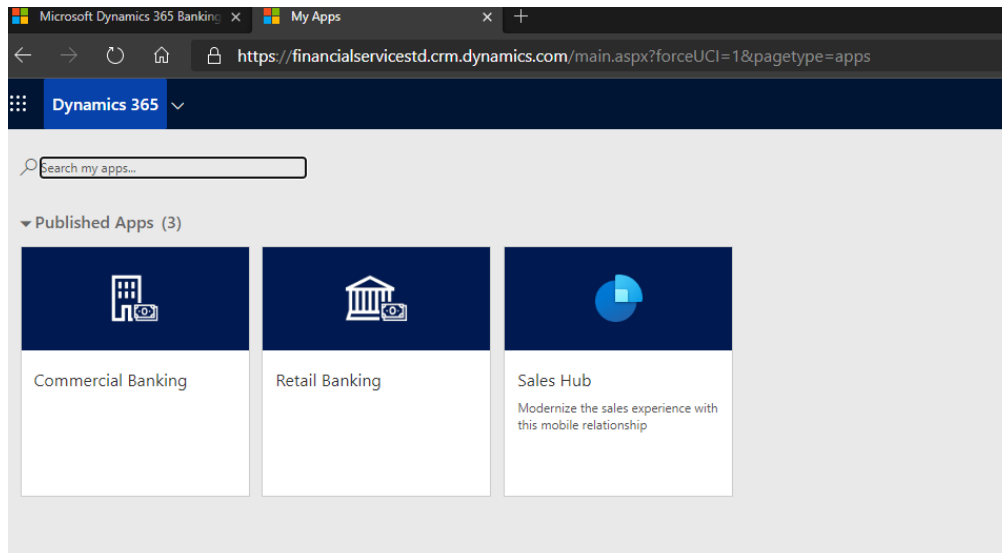
- Select the box and then **Continue**.



- Select **Accept**.

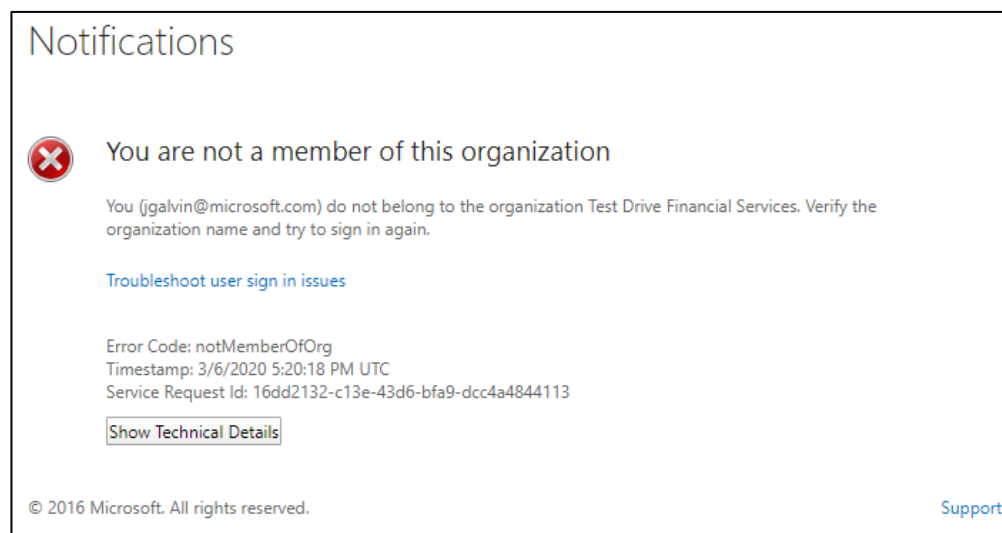
Start A Test Drive

Once you select **accept**, you'll be brought to the Banking Portal. Here you'll see a list of all the apps available to you.



Known Error Messages

Did you see this error message?



If you recently tried a test drive, you may receive this error. If so, please **open a private browser session and restart the test drive**. This should resolve the error. If it does not resolve this error message, please let us know at dynindaccsupport@microsoft.com

Personas

The walkthrough document was created with the following Personas in mind:

1. Banking Customer
 - a. The Banking Customer can be either a Person or Company who works with the bank.
2. Relationship Manager (Retail Banking)
 - a. The Relationship Manager will work with People and Companies to build stronger relationships and help build out a full Customer 360 view.
3. Loan Officer
 - a. The Loan Officer facilitates loans on both the Retail and Commercial side.
4. Relationship Manager (Commercial Banking)
 - b. The Relationship Manager will work with People and Companies to build stronger relationships and help build out a full Customer 360 view.
5. Branch Manager
 - a. The Branch Manager will use both the dashboards and analytics to help the bank and customers make effective decisions.

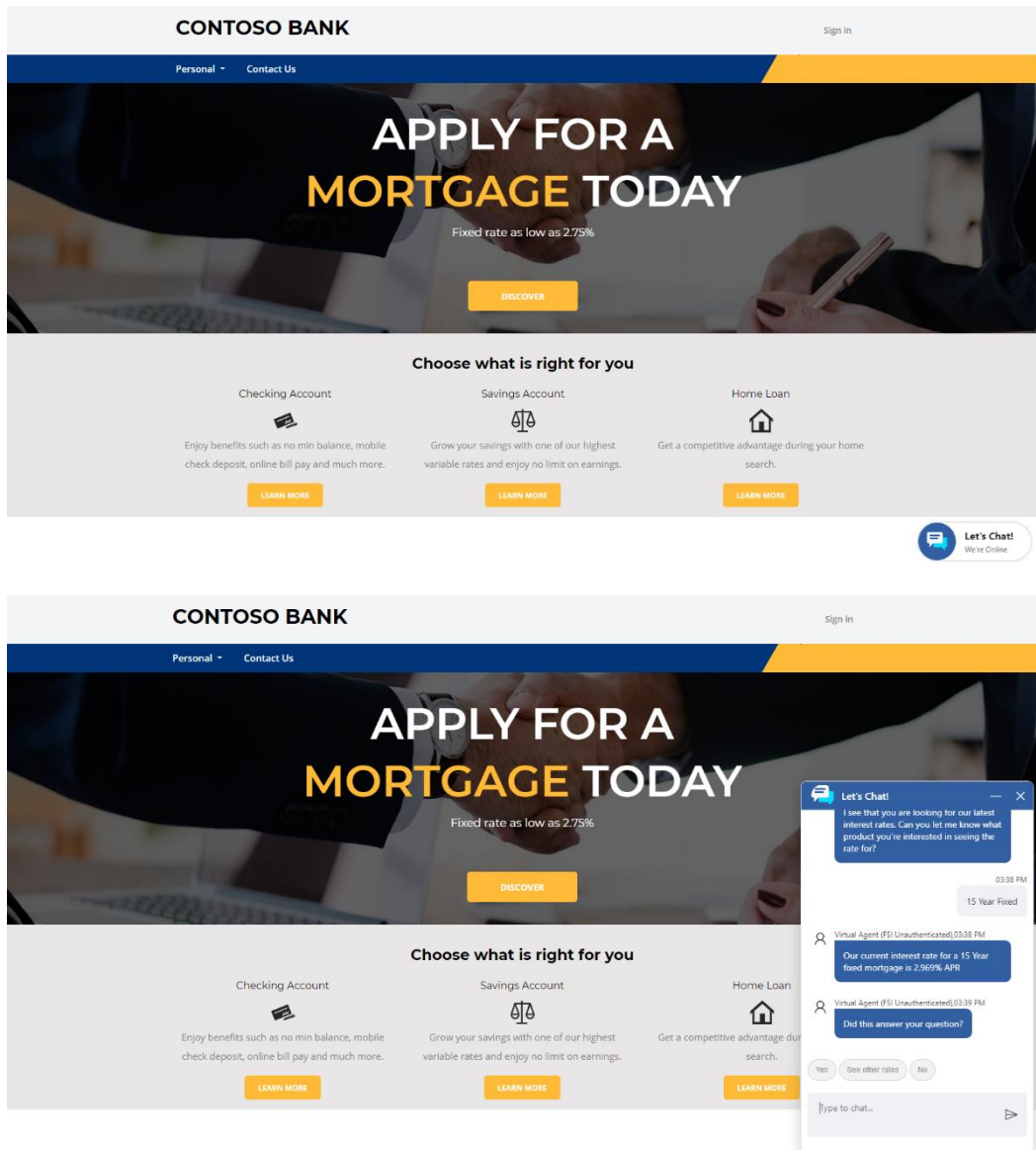
Walkthrough the Customer Journey

Join us on a journey through the eyes of one customer, Betty Welch. We'll walk you through the ways the Banking Accelerator helps your team maintain happy customers who return to you time and again.

Step 1: The customer's first touch – your company's website

Betty Welch is a customer at the Contoso Bank. She is interested in obtaining a better rate on her mortgage. She uses bank's website to check current rates for a 15-year mortgage.

You can see this at financialservicesportal.powerappsportals.com



Betty quickly chats with a virtual agent to learn mortgage rates for a 15-year fixed mortgage. She believes this is less than her mortgage but logs in to check.

[Note: Betty's user ID and password is already populated, so just sign-in]

Betty signs into her account in the upper right and views her available balances, payments, and mortgage interest rate. She looks further at her mortgage details and observes her interest rate is more than the going interest rate for a 15-year loan, she decides she would like to speak with a Contoso Bank representative to refinance her loan.

CONTOSO BANK

Sign in

Personal

Contact Us

Sign in Register Redeem invitation

Sign in with a local account

Sign in with an external account

* Username

bwelch

* Password

••••••••

☐ Remember me?

Sign in

Forgot your password?

Azure AD

CONTOSO BANK

Betty Welch

Accounts

Mortgage

Appointments

Contact Us

▼ My Checking

| Number ↑ | Available Balance | Initial Deposit |
|------------|-------------------|-----------------|
| XXXXXX5380 | US\$1,500.0000 | US\$500.0000 |
| XXXXXX6101 | US\$3,750.0000 | US\$3,000.0000 |


▼ My Payments


| Number ↑ | Initial Deposit | Last Payment Amount | Mode of Payment |
|------------|-----------------|---------------------|-------------------|
| XXXXXX1740 | US\$6,000.0000 | US\$50.0000 | Post Dated Checks |
| XXXXXX9067 | US\$4,500.0000 | US\$150.0000 | Post Dated Checks |
| XXXXXX8436 | US\$1,000.0000 | US\$200.0000 | Debit Authority |


▼ My Loans


| Number | Purpose of Loan | Interest Rate | Outstanding Total Amount |
|------------|-----------------|---------------|--------------------------|
| XXXXXX1923 | Mortgage Loan | 4.50 | US\$176,557 |

Offers for you

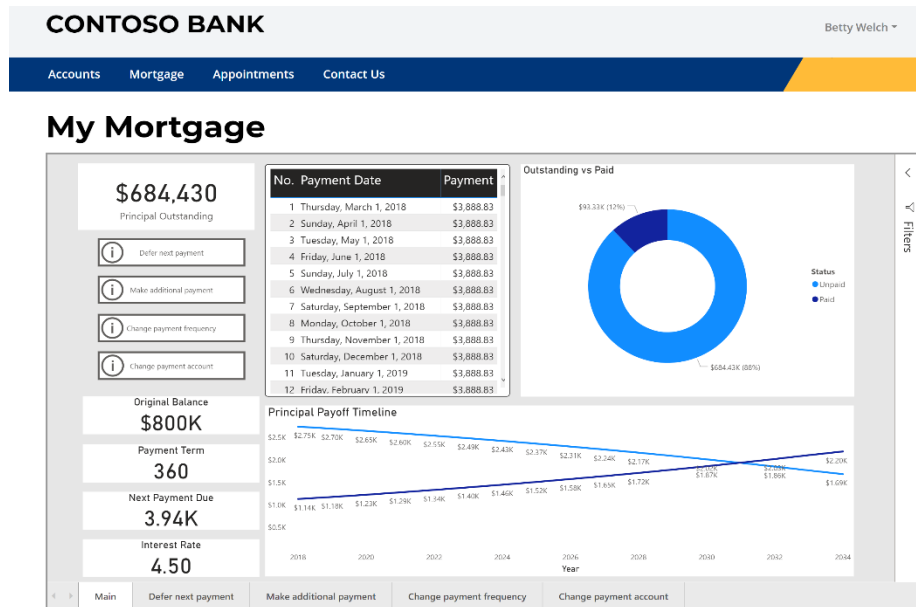
**Certificate of Deposit**
You could earn 2.30% APY on the idle cash in your savings account

**Brokerage Service - CD**
You have a high risk appetite - earn more from the cash in your savings account

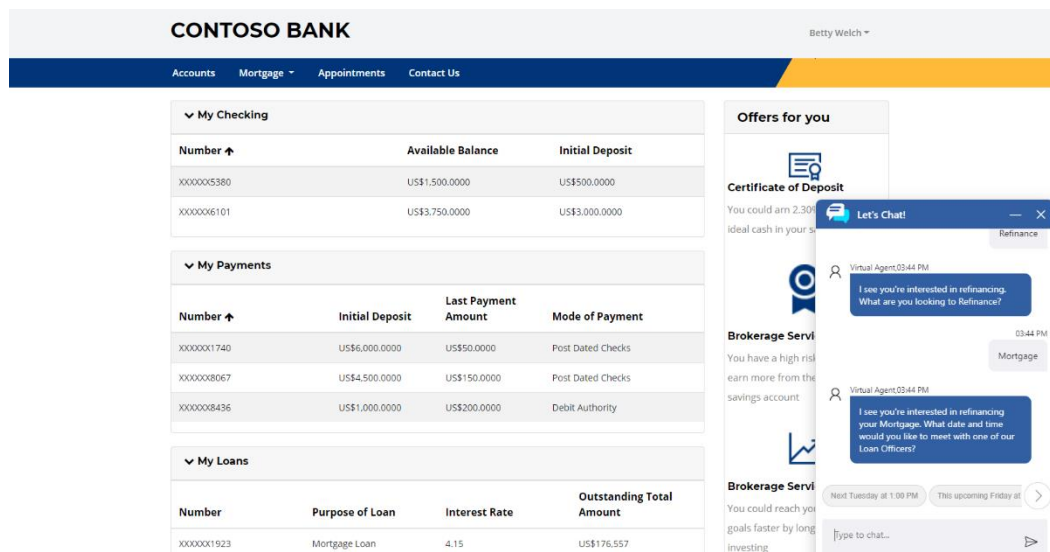
**Brokerage Service - Stocks**
You could reach your savings goals faster by long term investing

**Let's Chat!**
We're Online

8

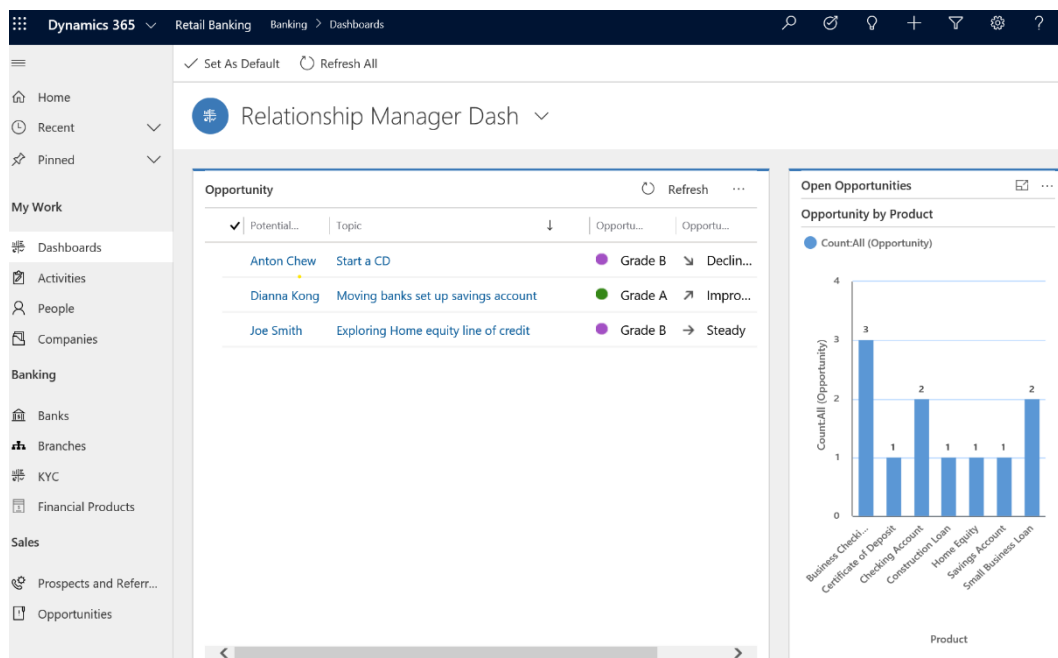
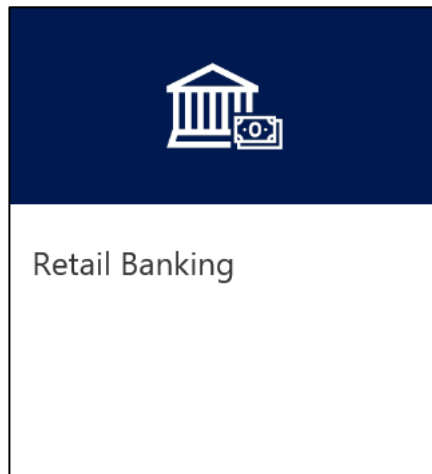


Using the virtual agent, she is now authenticated and can check her account balances and easily schedule an appointment at a time convenient for her right within the virtual agent.



Step 2: The customer visits your bank

Before Betty Welch visits Contoso Bank for her scheduled appointment, let's look at how the relationship manager starts their day.



They begin looking at an overview of all their opportunities and new referrals in the **Retail Banking** portal and the **Relationship Manager Dash**. They see their appointment with Betty Welch as well as all their open opportunities.

Microsoft Banking Accelerator Walkthrough (March 5, 2020)



Dynamics 365 Retail Banking Banking > People

Active People

| Full Name | Email | Company Name | Business Phone |
|-------------------|-------------------------------|----------------|----------------|
| Alejandro Pomeroy | alejandro.pomeroy@contoso.com | Contoso | (888) 555-7575 |
| Anton Chew | anton.chew@contoso.com | Contoso | (888) 555-7865 |
| Betty Welch | betty.welch@contoso.com | Coffee Inc | (888) 555-1900 |
| Blaine Carmack | blaine.carmack@contoso.com | Coffee Inc | (888) 555-9652 |
| Bryon Welch | bryon.welch@contoso.com | Coffee Inc | (888) 555-0111 |
| Clare Welch | clare.welch@contoso.com | AdventureWorks | (555) 555-0183 |
| Corey Crumpton | corey.crumpton@contoso.com | Contoso | (888) 555-9653 |
| Delia Schroeder | schroeder.delia@contoso.com | Coffee Inc | (888) 555-1125 |
| Dianna Kong | dianna.lancaster@contoso.com | Contoso | (888) 555-1010 |
| Earl Lauer | earl.lauer@contoso.com | Contoso | (888) 555-8547 |
| Emery Pearl | emery.pearl@contoso.com | Contoso | (888) 555-8585 |
| Eula Knox | eula.knox@contoso.com | Contoso | (888) 555-8457 |

To prepare for their meeting with Betty, the Relationship Manager looks at a customer 360 view.

Dynamics 365 Retail Banking Banking > People > Betty Welch

Read-only: You don't have access to edit this record.

Betty Welch
Person

James Galvin
Owner

Certificate of Deposit Completed in 57 hours

Validate Contact Information Start Application Product Information Close Opportunity

Profile Relationship Analytics Financial Products Households and Connections Referrals KYCs Interaction History Related

Personal

First Name Betty

Last Name Welch

Profit Tier High Medium Low

Gender Male Female

Employer Coffee Inc

Employment Status Full Time

Date of Birth 1/14/1978

Preferred Branch MDLND

Bill Pay Yes

Is Minor No

Contact

Mobile Phone (555) 555-1900

Business Phone (888) 555-1900

Email betty.welch@contoso.com

Street 1 4672 Vesta Drive

Street 2 Apt 4E

Street 3 ---

City Chicago

State/Province IL

ZIP/Postal Code 60605

Address 1: Country/Region USA

Residency Status Resident

To help give them the full picture, they look at Betty's **Profile**, **Financial Products**, and **Households and Connections**.

Microsoft Banking Accelerator Walkthrough (March 5, 2020)



Dynamics 365 > Retail Banking > Banking > Opportunities > Betty Certificate of Deposit

Read-only: You don't have access to edit this record.

Betty Certificate of Deposit
Opportunity

5/6/2019 Est. Close Date | --- Est. Revenue | In Progress Status | James Galvin Owner

Certificate of Deposit Completed in 57 hours

Validate Contact Information | **Start Application** | Product Information | Close Opportunity

Summary | Relationship Analytics | Financial Products | Interaction History | Related

Topic: Betty Certificate of Deposit

Contact: Betty Welch

Purchase Timeframe: Immediate

Currency: US Dollar

Budget Amount: ---

Purchase Process: Individual

Description: Betty is looking to open a new checking account.

Completed

- ✓ Purchase Timeframe: Immediate
- ✓ Purchase Process: Individual
- ✓ Description: Betty is looking to open a new checking account.

Top Reasons

- Grade B
- Declining

Credit Score 770

Churn Score 21.00

Monthly Income \$13,083.3333

Monthly Liabilities \$1,000.0000

Debt Burden Ratio 7.64

Delinquent Amount \$5,743.0000

Once with Betty, the Relationship Manager asks what Contoso Bank can assist her with. Betty discusses her desire to open a CD and refinance her mortgage. The Relationship Manager shares Contoso's high-yield CD rates. Betty is extremely happy and asks the Relationship Manager to start the CD application.

(*Please note as you view this in Read-only some of these steps you will not be able to test.)

Dynamics 365 > Retail Banking > Banking > KYC

Set As Default | Refresh All

Retail KYC Summary

Active Retail KYCs

Name by ID Expiry Date

Count: All (Name)

Dec 2019: 1, Mar 2020: 1, Sep 2021: 11

Active Retail KYCs

| Name | Risk Level | KYC Prepared On | Review Frequency | Customer |
|------------------------|------------|-----------------|------------------|-------------|
| Betty Welch April 2018 | Low | 4/30/2018 | Monthly | Betty Welch |
| Betty Welch Aug 2018 | Low | 8/30/2018 | Monthly | Betty Welch |
| Betty Welch Dec 2018 | Low | 12/30/2018 | Monthly | Betty Welch |
| Betty Welch Jan 2019 | Low | 1/30/2019 | Monthly | Betty Welch |
| Betty Welch July 2018 | Low | 7/30/2018 | Monthly | Betty Welch |
| Betty Welch June 2018 | Low | 6/30/2018 | Monthly | Betty Welch |
| Betty Welch May 2018 | Low | 5/30/2018 | Monthly | Betty Welch |
| Betty Welch May 2020 | Low | 5/6/2019 | Monthly | Betty Welch |
| Betty Welch Nov 2018 | Low | 11/30/2018 | Monthly | Betty Welch |
| Betty Welch Oct 2018 | Low | 10/30/2018 | Monthly | Betty Welch |
| Betty Welch Sept 2018 | Low | 9/30/2018 | Monthly | Betty Welch |
| Fall checkpoint | Low | 11/12/2019 | Quarterly | Betty Welch |
| Winter Checkpoint | Low | 1/14/2020 | Quarterly | Betty Welch |

Search for records

ALL # A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Microsoft Banking Accelerator Walkthrough (March 5, 2020)



The screenshot shows the 'Winter Checkpoint' form in Dynamics 365. The form is titled 'Winter Checkpoint' and is for a customer named 'Betty Welch'. The form is divided into several sections: Summary, ID Information, Additional KYC Details, FATCA Declaration, and Related. The Summary section shows the customer's name, mobile number, email, risk level, review frequency, and KYC prepared on date. The ID Information section shows the customer's first, middle, and last names. The Additional KYC Details section shows the customer's mobile number, email, and risk level. The FATCA Declaration section shows the customer's review frequency and KYC prepared on date. The Related section shows the customer's KYC prepared on date.

| Field | Value |
|------------------|-------------------------|
| Name | Winter Checkpoint |
| First Name | Betty |
| Middle Name | Elizabeth |
| Last Name | Welch |
| Mobile Number | (555) 555-1900 |
| Email | betty.welch@contoso.com |
| Risk Level | Low |
| Review Frequency | Quarterly |
| KYC Prepared On | 1/14/2020 |

During the application process, the Relationship Manager looks at the Know Your Customers (KYCs) and re-validates Betty's information before finalizing the CD application. Betty is happy with her new high-yield CD. Knowing Betty is interested in learning more about refinancing her home, the Relationship Manager refers a Loan Officer to follow up with her.

Step 3: The customer seamlessly refinances her home

A Loan Officer is put in contact with Betty Welch. Knowing she wants to refinance her home at a lower interest rate, they share all the options available to her. (*Please note Betty's view is on her new CD account), please click on her husband, Bryon Welch, if you'd like to see the mortgage application process.)

The screenshot shows the 'Person' card for Betty Welch in Dynamics 365. The card is titled 'Betty Welch' and is for a person. The card is divided into several sections: Profile, Relationship Analytics, Financial Products, Households and Connect..., Referrals, and KYCs. The Profile section shows the customer's personal information, including first name, last name, profit tier, gender, employer, employment status, date of birth, preferred branch, bill pay, and is minor status. The Relationship Analytics section shows the customer's relationship with the company. The Financial Products section shows the customer's financial products. The Households and Connect... section shows the customer's households and connections. The Referrals section shows the customer's referrals. The KYCs section shows the customer's KYCs.

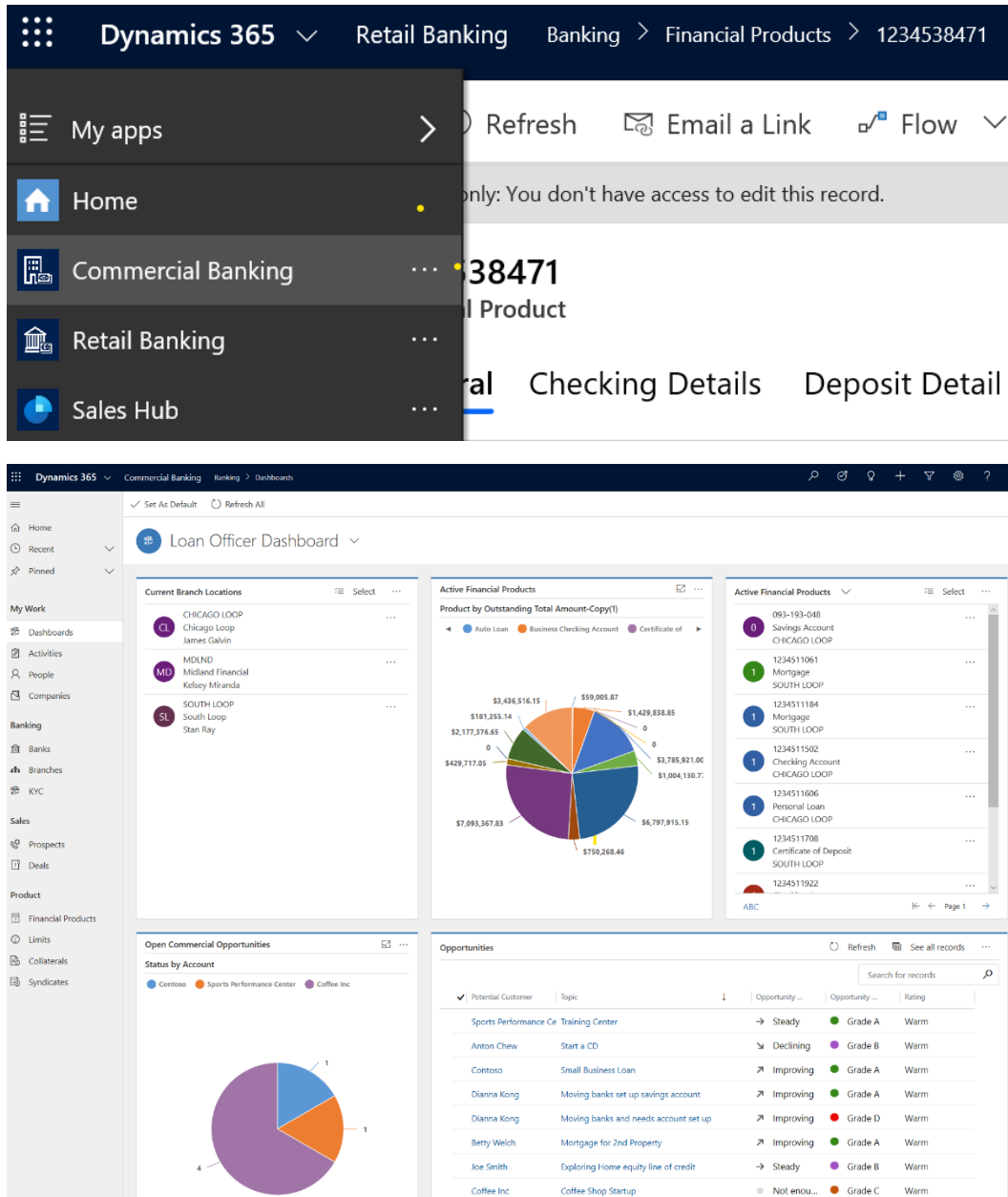
| Field | Value |
|-------------------|------------|
| First Name | Betty |
| Last Name | Welch |
| Profit Tier | High |
| Gender | Female |
| Employer | Coffee Inc |
| Employment Status | Full Time |
| Date of Birth | 1/14/1978 |
| Preferred Branch | MDLND |
| Bill Pay | Yes |
| Is Minor | No |

| Field | Value |
|------------------|-------------------------|
| Mobile Phone | (555) 555-1900 |
| Business Phone | (888) 555-1900 |
| Email | betty.welch@contoso.com |
| Street 1 | 4672 Vesta Drive |
| Street 2 | Apt 4E |
| Street 3 | --- |
| City | Chicago |
| State/Province | IL |
| ZIP/Postal Code | 60605 |
| Address 1: | USA |
| Country/Region | USA |
| Residency Status | Resident |

Betty is so pleased with both her high-yield CD and lower-interest-rate home loan refinance she asks to discuss her options for expanding her Coffee Inc business.

Step 4: The customer easily applies for business loan

The Loan Officer switches from the retail banking portal to **commercial banking**. Coffee Inc wants to expand the business and needs financing to include for the new coffee shop.



The screenshot displays the Dynamics 365 interface. The top navigation bar shows 'Dynamics 365' with a dropdown arrow, followed by 'Retail Banking', 'Banking', and 'Financial Products'. The breadcrumb trail indicates the current location: '1234538471'. A sidebar menu on the left lists 'My apps', 'Home', 'Commercial Banking', 'Retail Banking', and 'Sales Hub'. The main content area shows a 'Refresh' button, 'Email a Link', and a 'Flow' dropdown. A message states: 'You don't have access to edit this record.' Below this, the account number '1234538471' is displayed, followed by 'Product' and 'Checking Details'. The bottom section shows the 'Loan Officer Dashboard' with various charts and tables. The 'Current Branch Locations' table lists three locations: CHICAGO LOOP, MDLND, and SOUTH LOOP. The 'Active Financial Products' section shows a pie chart and a table of products. The 'Open Commercial Opportunities' section shows a pie chart and a table of opportunities. The 'Opportunities' table lists various opportunities with columns for Potential Customer, Topic, Opportunity, Opportunity, and Rating.

| Potential Customer | Topic | Opportunity | Opportunity | Rating |
|-----------------------|---------------------------------------|---------------|-------------|--------|
| Sports Performance Ce | Training Center | → Steady | Grade A | Warm |
| Anton Chew | Start a CD | ↘ Declining | Grade B | Warm |
| Contoso | Small Business Loan | ↗ Improving | Grade A | Warm |
| Dianna Kong | Moving banks set up savings account | ↗ Improving | Grade A | Warm |
| Dianna Kong | Moving banks and needs account set up | ↗ Improving | Grade D | Warm |
| Betty Welch | Mortgage for 2nd Property | ↗ Improving | Grade A | Warm |
| Joe Smith | Exploring Home equity line of credit | → Steady | Grade B | Warm |
| Coffee Inc | Coffee Shop Startup | ○ Not enou... | Grade C | Warm |

On the way to open Coffee Inc's financials, the Loan Officer views all top opportunities in their **Dashboard**.

Microsoft Banking Accelerator Walkthrough (March 5, 2020)



Dynamics 365 Commercial Banking Banking > Deals > Coffee Shop Expansion

Home Recent Pinned My Work Dashboards Activities People Companies Banking Banks Branches KYC Sales Prospects Deals Product Financial Products Limits Collaterals Syndicates

Read-only: You don't have access to edit this record.

Coffee Shop Expansion Opportunity

Est. Close Date Est. Revenue Status James Galvin Owner

Summary Relationship Analytics Financial Products Interaction History Related

Topic: Coffee Shop Expansion

Account: Coffee Inc

Purchase Timeframe: Immediate

Currency: US Dollar

Budget Amount: \$80,000.00

Purchase Process: Committee

Description: Based upon current projections the coffee shop will be looking to expand their current operations later this year. Coffee Shop needs more brewing equipment and wants to roast beans in house.

Predictive Opportunity Scoring

74

Grade A

Steady

Top Reasons

Bank's YTD Revenue: \$2,000,000.0000

Company's Profit in the Last Year: \$400,000.0000

Company Turnover in the last Year: \$0.0000

Total Past Due: \$0.0000

Past Due Since: ---

Total Deposits: \$0.0000

Last updated: 3/11/2020 3:25 PM

Total Loans: \$1,174,953.23

Last updated: 3/11/2020 3:25 PM

Before they can help with a loan for the **Coffee Shop Expansion**, the Loan Officer learns more about Coffee Inc's financial details and needs.

Dynamics 365 Commercial Banking Banking > Companies > Coffee Inc

Home Recent Coffee Inc Active Companies Coffee Shop Expansion Open Commercial D... Betty Welch Loan Officer Dashbo... Application Overview 1234538471 Mortgage Active People Pinned My Work Dashboards Activities People Companies Banking Banks Branches KYC Sales Prospects

Read-only: You don't have access to edit this record.

Coffee Inc Company

\$800,000.00 Annual Revenue 6 Number of Employees James Galvin Owner

Commercial Deal Active for 9 months Validate Company Information (4 D) Start Application Enter Requested Facilities Gather Documents Close

Summary Contacts and Connections Facilities KYCs Address Details Related

ACCOUNT INFORMATION

Account Name: Coffee Inc

Profit Tier: High Medium Low

Phone: (800) 555-1099

Website: https://www.coffeeinc.com

Primary Account: Contoso

Enrollment Branch: CHICAGO LOOP

Industry: Eating and Drinking Places

Credit Hold: No

Primary Contact: Betty Welch

Email: betty.welch@contoso.com

Business: (888) 555-1900

REVIEW INFORMATION

Annual Review Date: 9/7/2019

Bank's YTD Revenue: \$2,000,000.0000

Company Turnover in the last Year: \$0.0000

Risk Rating: 8

Active Financial Products

Product by Outstanding Total Amount-Copy(1)

Business Checking Account Commercial Mortgage

\$43,678.31 \$0.00 \$21,099.81 \$320,360.70 \$786,814.41

1744 Term Loan CHICAGO LOOP

1826 Business Checking Account CHICAGO LOOP

5478 Equipment Finance CHICAGO LOOP

5489 Small Business Loan CHICAGO LOOP

Page 1

Microsoft Banking Accelerator Walkthrough (March 5, 2020)



Dynamics 365 Commercial Banking Banking > Companies > Coffee Inc

Read-only: You don't have access to edit this record.

Coffee Inc Company
Annual Revenue: \$800,000.00 Number of Employees: 6 Owner: James Galvin

Commercial Deal Active for 9 months

Validate Company Information (4 D) Start Application Enter Requested Facilities Gather Documents Close

Summary Contacts and Connections **Facilities** KYCs Address Details Related

MIS

| | |
|-----------------------------------|------------------|
| Total Deposits | \$0.0000 |
| Last updated: | 3/9/2020 2:25 PM |
| Total Loans | \$1,174,953.23 |
| Last updated: | 3/9/2020 2:25 PM |
| Return on Capital | 80.00 |
| Company's Profit in the Last Year | \$400,000.0000 |
| Total Past Due | \$0.0000 |
| Past Due Since | --- |
| Days Past Due | 0 |

Facilities

| Number | Product | Branch | Available Balan... |
|--------|------------------|--------------|--------------------|
| 1744 | Term Loan | CHICAGO LOOP | \$42,698.0000 |
| 1826 | Business Checkir | CHICAGO LOOP | \$87,621.0000 |
| 5478 | Equipment Finar | CHICAGO LOOP | \$61,988.0000 |
| 5489 | Small Business L | CHICAGO LOOP | \$6,730.0000 |

1 - 4 of 5 (0 selected) Page 1

LIMITS

| | |
|-------------------|------------------|
| Implemented Limit | \$750,000.00 |
| Last updated: | 3/9/2020 2:25 PM |
| Utilized Limit | \$20000 |
| Last updated: | 3/9/2020 2:25 PM |
| Available Limit | \$25000 |
| Last updated: | 3/9/2020 2:25 PM |
| Total Limit | \$1,000,000.0000 |
| Limit Review Date | 8/3/2019 |

Then they review a summary of the commercial deal and check the needed facilities and view how much of their limit Coffee Inc is using.

Dynamics 365 Commercial Banking Banking > Financial Products > 1744

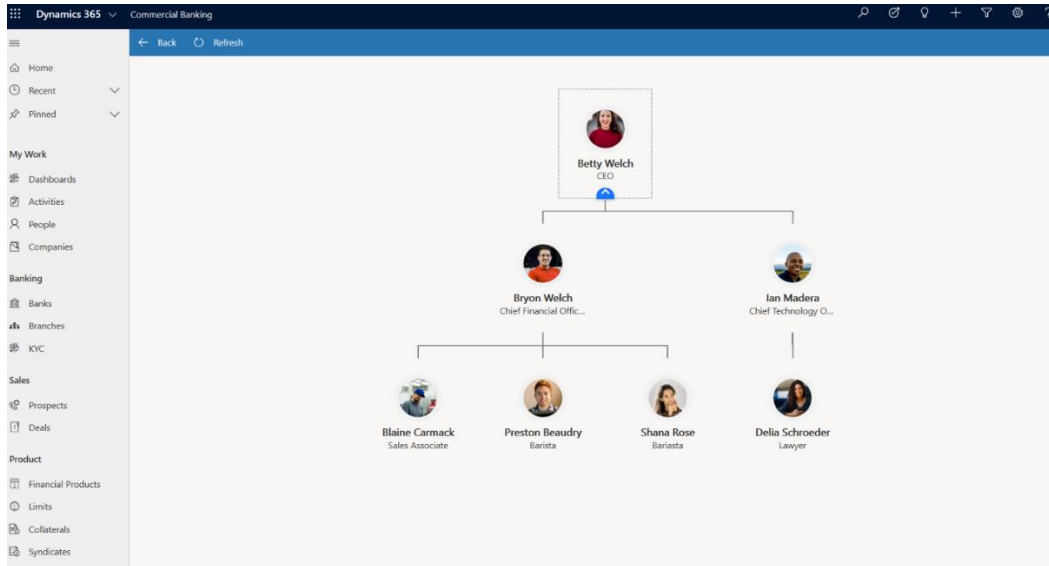
Read-only: You don't have access to edit this record.

1744 Financial Product

General Checking Details Deposit Detail **Loan Detail** Commercial Loan Details Notes/Further Details Related

Loan Detail

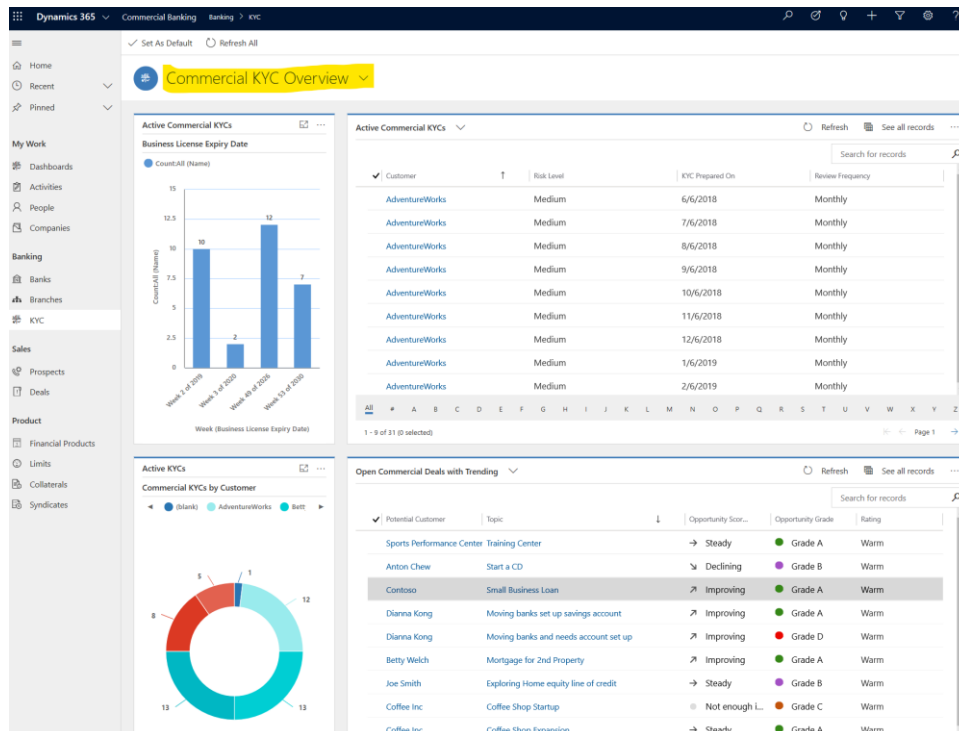
| | | | |
|------------------------------|----------------|-----------------------------|-----------|
| Loan Type | --- | Outstanding Total Amount | \$0.00 |
| Purpose of Loan | --- | Loan Start Date | --- |
| Principal Amount | \$350,959.0000 | Last Payment Amount | --- |
| Disbursed Amount | \$350,959.0000 | Next Payment Amount | --- |
| Disbursement Date | --- | Loan Maturity Date | 6/15/2019 |
| Interest Rate | 10.00 | Overdue Installment Amount | --- |
| Interest Amount | --- | Overdue Date | --- |
| Installment Amount | --- | Days Past Due | --- |
| Term | 12 | Delinquency Status | --- |
| Outstanding Principal Amount | \$0.0000 | Number of Installments Paid | --- |
| | | Number of Deferrals Made | --- |



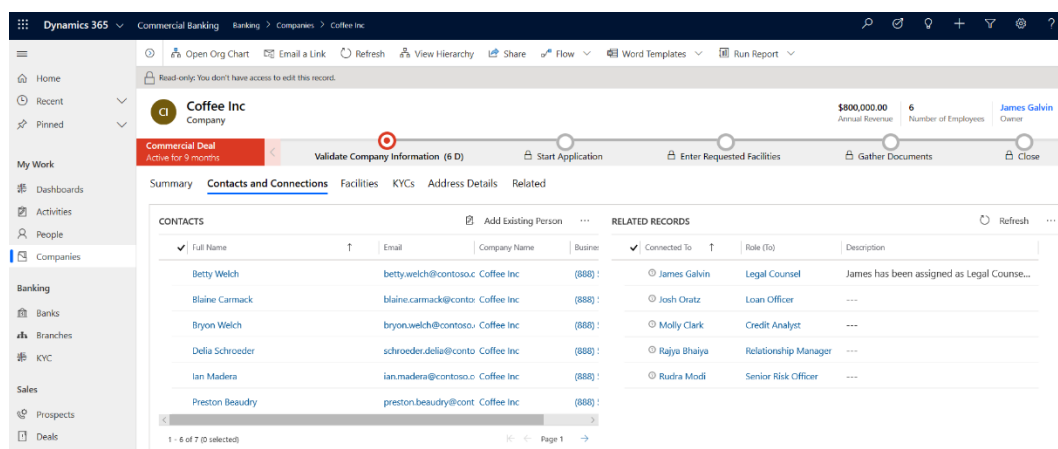
The Loan Officer views more details of this commercial loan and speaks with the CFO of Coffee Inc, Byron Welch, with a few questions. Once satisfied with all the facts and figures, the Loan Offer processes and awards the loan to Coffee Inc.

Step 4: Building customer relationships

To continue building their relationship with Coffee Inc and other active businesses, the Relationship Manager reviews their **Commercial KYC Summary** and **Overview**.



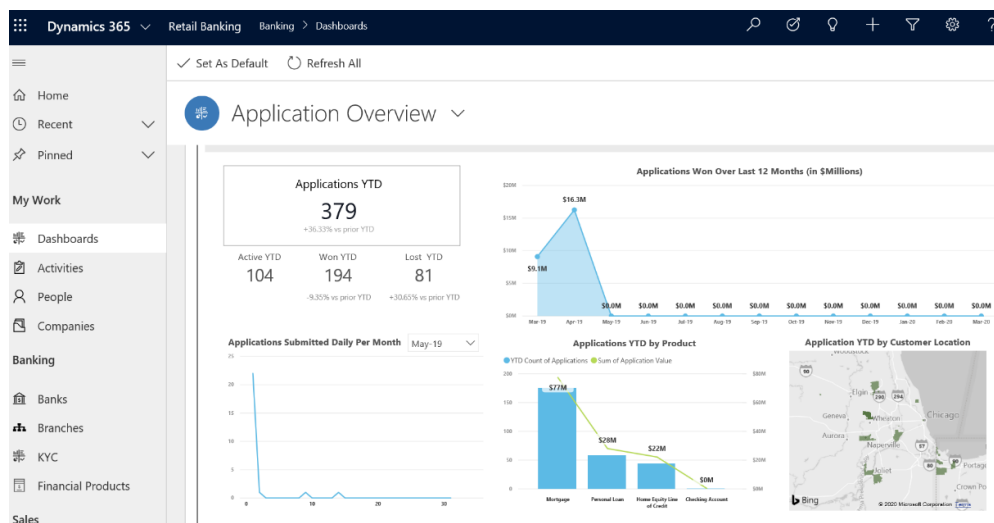
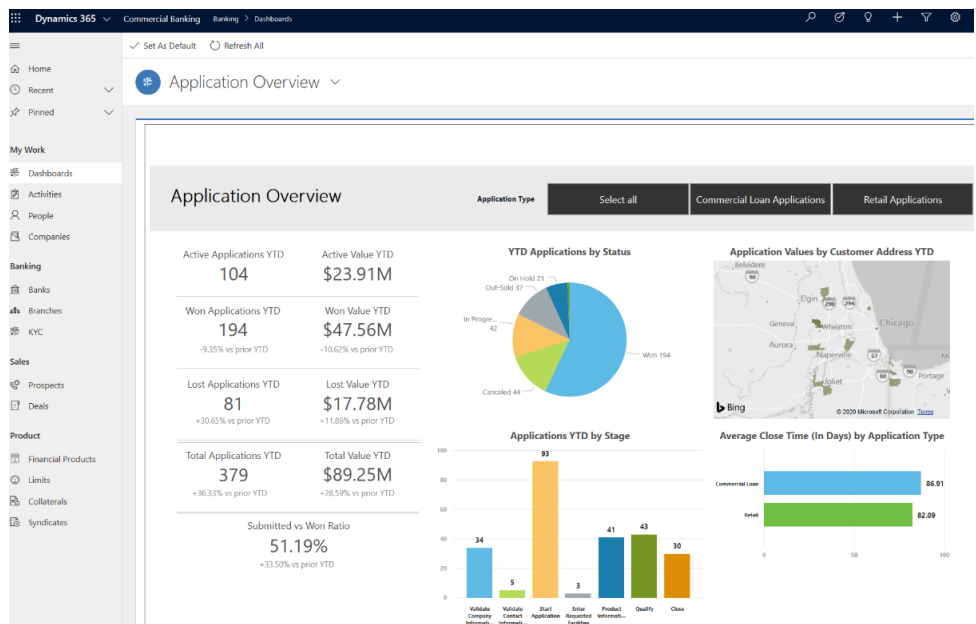
They view the active businesses and lead scoring on the open commercial deals. Here the Relationship Manager is excited to see an additional deal with Coffee Inc, the **Coffee Shop Expansion**.



The Relationship Manager wants to better understand the commercial deal for their client, Coffee Inc. and their **Contacts and Connections**.

Step 5: Your customers are always supported

The Branch Manager sees both the retail and commercial sides of the bank. They view analytics and insights to improve the branch operations and performance of their team from the **Application Overview** Dashboard from Power BI. Their insights and team support ensure success of every customer interaction and deal.



Step 6: Happy customer = future business & referrals

Betty walks away from her encounter with Contoso Bank extremely happy. The entire experience for her felt seamless. She now has a high-yielding CD and the facilities needed to expand Coffee Inc. She goes on to recommend Contoso Bank to her friends and business colleagues. Thank you for completing the Banking Accelerator Test Drive.