

Cross Sales Since Last Year

□ In the 15.0 release (April)

- Introduced the Cross Sales Analysis Dashboard (in active beta)
- Manual calculation of incentive amounts

□ In the 15.2 release (October)

- Configurable Cross Sales incentive amounts
- Staff can track their own Cross Sales status
- One-click logging of Cross Sales activity

Account Base	Need Group/Task	Task Description	Memo Type	Contact Date	Employee #/Name	In	Incentive
30	06	loan referrals	AP	Approved	Jan 17, 2015	04	01 .20
30	30	PIN for Home Banking/ATM	AP	Approved	Jan 16, 2015	EP	01 .20
30	30	PIN for Home Banking/ATM	AP	Approved	Jan 16, 2015	FC	01 .20
30	30	PIN for Home Banking/ATM	AP	Approved	Jan 16, 2015	KF	01 .20
30	30	PIN for Home Banking/ATM	AP	Approved	Jan 16, 2015	12	02 .20
30	30	PIN for Home Banking/ATM	AP	Approved	Jan 16, 2015	KJ	01 .20
30	06	loan referrals	AP	Approved	Jan 16, 2015	53	01 .20
30	27	Opt in for bounce protect	AP	Approved	Jan 17, 2015	R2	01 .20
30	05	Loan Steals	AP	Approved	Jan 16, 2015	HJ	01 .20
30	27	Opt in for bounce protect	AP	Approved	Jan 16, 2015	SH	01 .20
30	27	Opt in for bounce protect	AP	Approved	Jan 16, 2015	SH	01 .20

Teller/Member Service

✓ Log Your Cross-Sales Activity with Just One Click!

When your tellers or member service representatives talk to a member about one of your cross-sales promos, do they use a scrap pad to jot down a note then log the tasks later after the member leaves? This tool will let them log the work without missing a beat.

Activate the new Cross Sales Shortcuts and an member service representative can enter the Need Group #, Task # and Memo Type codes for a cross-sales task directly onto the Inquiry and Phone Operator main screens.

This is intentionally a no-frills shortcut. There are no lookups for these fields; just type the three codes and click Log! The system will automatically fill in the employee ID, date, and a generic block of text for the Tracker note. You can even log multiple tasks, one after the other, without ever leaving the screen.



We added the shortcut feature to the handy "last 10 accounts used" window, too. Now a single click on Log! selects a recently-used account, or you can log cross-sales activity for one or more of the members you just served.

Account #	Member Name	NG	TSK	MT	Log!
4355	JANE E MEMBER	20	70	AH	Log!
30	MARY S TESTING				Log!
528	JOHN A MEMBER				Log!