

Rayterton Banking CRM

Rayterton Banking CRM is a unified platform for managing customer relationships, sales, onboarding, and service in one integrated system. Seamlessly connected to core banking and digital channels, it helps banks improve customer engagement, accelerate growth, and support operational and regulatory processes.

About Rayterton Banking CRM

Rayterton Banking CRM is a comprehensive CRM platform designed specifically for banks to manage customer relationships, sales, onboarding, and service operations in a single integrated system. Built with an API first architecture, the platform integrates seamlessly with core banking systems and digital channels, enabling banks to modernize customer engagement without major changes to existing infrastructure. By consolidating customer data, onboarding workflows, sales activities, campaigns, and service operations, Rayterton Banking CRM helps banks improve operational efficiency, accelerate growth, and maintain regulatory readiness.

End to end Operating Story

Rayterton Banking CRM orchestrates the full customer lifecycle, starting from lead capture and onboarding, through relationship management and campaign execution, to service, complaints handling, and performance analytics. A unified customer view ensures that sales, service, and operations teams work from the same trusted data, while configurable workflows and integrations ensure alignment with bank SOP and regulatory processes.

Customer 360 Dashboard

The Customer 360 module provides a complete, unified view of each customer across products, interactions, and service history. It consolidates customer profile data, product holdings, and communication records into a single screen, enabling relationship managers and service teams to quickly understand customer context, ongoing activities, and relationship status.

Customer Profile Summary:

- Customer:** James Davidson (Active)
- Rating:** 4.8 Rating
- Customer ID:** CUST-2024-0892
- Tier:** VIP Tier
- Relationship Status:** Premium Banking Customer since 2018
- Location:** New York, USA
- Employer:** TechCorp Inc.
- Contact Information:** Email: james.davidson@email.com, Phone: +1 (555) 234-5678
- Actions:** Call Customer, Send Email, Schedule Meeting

Relationship Status: High Value Client (6+ years relationship)

Interaction History:

- Jan 27, 2026 - 2:30 PM: Discussed investment portfolio rebalancing (Phone Call)
- Jan 25, 2026 - 10:15 AM: Monthly statement sent (Email)
- Jan 22, 2026 - 3:45 PM: Branch visit - Mortgage consultation (In-Person)
- Jan 20, 2026 - 11:00 AM: Fraud alert verification (Phone Call)

Open Cases:

- CASE-2026-089: Mortgage rate adjustment request (Urgent)
- CASE-2026-092: Credit card dispute - \$2,340 (High)
- CASE-2026-095: Investment account transfer (High)

Portfolio Distribution:

View All Products

Product	Account Number	Balance	Status	Opened	Last Activity
Checking Account	****-4521	\$45,230.50	Active	Mar 15, 2018	Jan 27, 2026
Savings Account	****-7832	\$128,450.00	Active	Jun 22, 2018	Jan 26, 2026
Investment Portfolio					
Mortgage Loan					
Credit Card					

Recent Transactions:

Date	Description	Category	Account	Amount	Status
Jan 27, 2026	Salary Deposit	Income	Checking ****-4521	+\$8,500.00	Completed
Jan 26, 2026	Grocery Store	Shopping	Credit Card ****-8890	-\$156.78	Completed
Jan 25, 2026	Electric Bill	Utilities	Checking ****-4521	-\$89.45	Completed
Jan 24, 2026	Investment Contribution	Investment	Checking ****-4521	-\$2,000.00	Completed
Jan 23, 2026	Restaurant	Dining	Credit Card ****-8890	-\$67.32	Completed

Leads Management and Qualification

The Leads Management module centralizes all incoming leads from multiple sources and supports structured qualification and assignment. It enables teams to track lead status, identify lead sources, and convert qualified leads into sales opportunities, ensuring timely follow up and improved lead to opportunity conversion.

Banking CRM Leads Management
Centralized lead capture and qualification

+ Add New Lead ▾ Filter

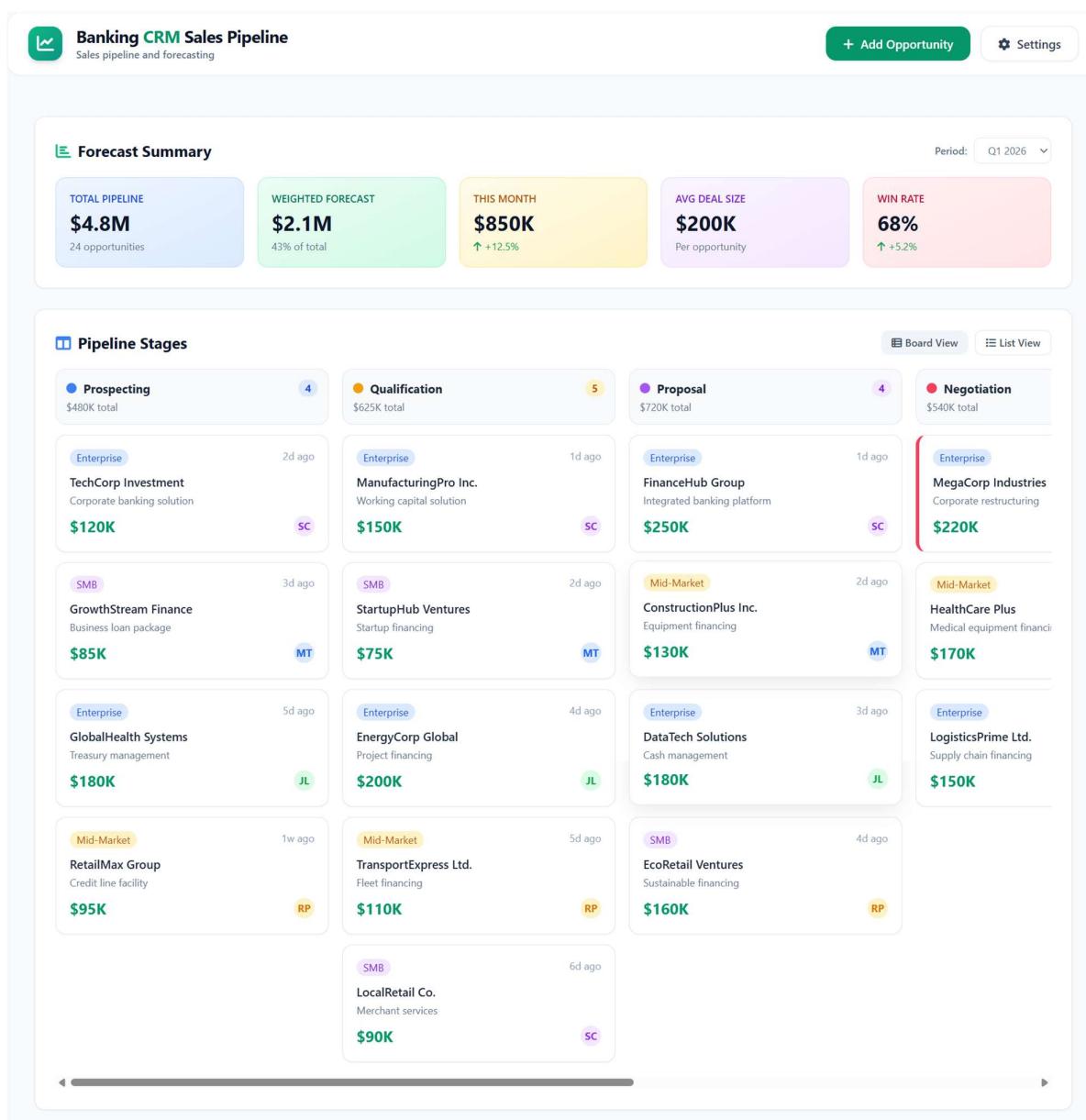
TOTAL LEADS	247	+ 12 this week	NEEDS	58	Awaiting assignment	QUALIFIED	89	Ready for conversion	IN PROGRESS	67	Active follow-up	CONVERSION RATE	36%	↑ +4.2%
Lead List														
Lead	Contact	Lead Source	Status	Score	Assign to RM	Created	Actions							
AS	Amanda Smith LEAD-2026-001	amanda.smith@email.com +1 (555) 123-4567	Website	Qualified	85	SC	Sarah Chen	Jan 15, 2026	<button>Convert</button>					
MJ	Michael Johnson LEAD-2026-002	m.johnson@company.com +1 (555) 234-5678	Referral	Contacted	72	MT	Mike Torres	Jan 16, 2026	<button>Convert</button>					
EW	Emily Wilson LEAD-2026-003	emily.w@email.com +1 (555) 345-6789	Event	New	45		Unassigned	Jan 17, 2026	<button>Convert</button>					
RB	Robert Brown LEAD-2026-004	robert.b@biz.com +1 (555) 456-7890	Campaign	Qualified	92	JL	James Lee	Jan 18, 2026	<button>Convert</button>					
JD	Jennifer Davis LEAD-2026-005	j.davis@startup.io +1 (555) 367-8901	Website	Contacted	68	SC	Sarah Chen	Jan 19, 2026	<button>Convert</button>					
DM	David Martinez LEAD-2026-006	d.martinez@corp.com +1 (555) 678-9012	LinkedIn	Qualified	88	RP	Rachel Park	Jan 20, 2026	<button>Convert</button>					
ST	Sarah Thompson LEAD-2026-007	s.thompson@agency.com +1 (555) 789-0123	Referral	In Progress	75	MT	Mike Torres	Jan 21, 2026	<button>Convert</button>					
CW	Christopher White LEAD-2026-008	c.white@enterprise.com +1 (555) 890-1234	Campaign	New	52		Unassigned	Jan 22, 2026	<button>Convert</button>					
LG	Lisa Garcia LEAD-2026-009	lisa.g@finance.com +1 (555) 901-2345	Website	Qualified	90	JL	James Lee	Jan 23, 2026	<button>Convert</button>					
KH	Kevin Hall LEAD-2026-010	k.hall@tech.com +1 (555) 012-3456	Event	Contacted	70	SC	Sarah Chen	Jan 24, 2026	<button>Convert</button>					
NA	Nancy Adams LEAD-2026-011	n.adams@retail.com +1 (555) 123-4568	Campaign	Lost	35	MT	Mike Torres	Jan 25, 2026	<button>Convert</button>					
PT	Paul Turner LEAD-2026-012	p.turner@invest.com +1 (555) 234-5679	Referral	Qualified	87	RP	Rachel Park	Jan 26, 2026	<button>Convert</button>					
MR	Michelle Rodriguez LEAD-2026-013	m.rodriguez@health.com +1 (555) 345-6780	Website	In Progress	78	JL	James Lee	Jan 27, 2026	<button>Convert</button>					
JN	James Nelson LEAD-2026-014	j.nelson@legal.com +1 (555) 456-7891	LinkedIn	New	48		Unassigned	Jan 27, 2026	<button>Convert</button>					
OL	Olivia Lewis LEAD-2026-015	o.lewis@consult.com +1 (555) 567-8902	Event	Contacted	73	SC	Sarah Chen	Jan 28, 2026	<button>Convert</button>					
AW	Andrew Walker LEAD-2026-016	a.walker@manufacturing.com +1 (555) 678-9013	Campaign	Qualified	91	MT	Mike Torres	Jan 28, 2026	<button>Convert</button>					
SH	Sandra Hill LEAD-2026-017	s.hill@energy.com +1 (555) 789-0124	Website	In Progress	76	RP	Rachel Park	Jan 29, 2026	<button>Convert</button>					
RC	Ryan Clark LEAD-2026-018	r.clark@transport.com +1 (555) 890-1235	Referral	Qualified	89	JL	James Lee	Jan 29, 2026	<button>Convert</button>					
BP	Benjamin Price LEAD-2026-019	b.price@retail.com +1 (555) 901-2346	LinkedIn	Contacted	71	SC	Sarah Chen	Jan 29, 2026	<button>Convert</button>					
KM	Kimberly Moore LEAD-2026-020	k.moore@fashion.com +1 (555) 012-3457	Event	New	50		Unassigned	Jan 29, 2026	<button>Convert</button>					

Showing 1-20 of 247 leads

1 2 3 ... 13 >

Opportunities and Sales Pipeline

The Opportunities and Sales Pipeline module provides full visibility into the sales lifecycle, from initial opportunity creation to deal closure. It allows sales teams and management to track pipeline stages, monitor deal progress, and review forecast summaries, supporting better sales planning and revenue visibility.



Onboarding Forms and KYC Workflows

The Onboarding and KYC module digitizes customer onboarding and standardizes KYC processes across the bank. It supports multi step application forms, document collection, KYC checklist tracking, and approval workflows, helping banks reduce manual processing while maintaining consistent onboarding and compliance procedures.

Banking CRM Onboarding & KYC
Digital onboarding and KYC workflows

Step 3 of 5: KYC Verification

Personal Info (Completed) | Contact Details (Completed) | KYC Verification (3) | Document Upload | Review & Submit

Personal Information (Completed)

First Name: John	Last Name: Anderson
Date of Birth: March 15, 1985	Gender: Male
Nationality: United States	Marital Status: Married

KYC Checklist (12/18 items)

- Personal information verified
- Contact details confirmed
- Government ID uploaded
- Proof of address verified
- Email address validated
- Phone number verified

Contact Details (Completed)

Email Address: john.anderson@email.com
Residential Address: 123 Main Street, Apt 4B, New York, NY 10001
City: New York

Employment Information (In Progress)

Employment Status: Employed	Occupation: Enter occupation
Employer Name: Company name	Annual Income: Select range
Employer Address: Company address	

Document Upload (In Progress)

- Government ID**: passport_front.jpg (2.4 MB) (Uploaded)
- Proof of Address**: utility_bill.pdf (1.8 MB) (Uploaded)
- Income Proof**: (Pending)
- Tax Document**: (Required)

Submit for Approval

Your application is 67% complete. Complete all required items before submission.

Complete & Submit | **Save & Continue Later**

Estimated processing time: 2-3 business days

Document Management and eSign

The Document Management and e Sign module enables secure creation, storage, and signing of customer documents. It provides document templates, electronic signature capabilities, and a centralized file vault, supporting faster agreement processing and improved control over customer documentation.

Banking CRM Document Management
Secure documents and electronic signature

TOTAL DOCUMENTS
1,247
↑ +23 this week

PENDING SIGNATURE
34
Awaiting action

SIGNED DOCUMENTS
1,089
87% completion

STORAGE USED
45.2 GB
of 100 GB

Document Templates
View All

- Loan Agreement - Banking Services (2.4 KB)
- Credit Application - Lending (1.8 KB)
- Account Opening - Onboarding (3.1 KB)
- Mortgage Contract - Real Estate (4.2 KB)
- Privacy Policy (5.6 KB)

Contract Preview

LOAN AGREEMENT
Agreement No: LA-2026-0042 | Date: January 29, 2026

Lender: National Banking Corporation
123 Financial District, NY 10001

Borrower: John Anderson
456 Main Street, Apt 4B, NY 10001

Loan Details:
Principal Amount: \$150,000.00
Interest Rate: 5.25% APR
Term: 36 months

Terms and Conditions:
This Loan Agreement ("Agreement") is entered into between National Banking Corporation ("Lender") and John Anderson ("Borrower"). The Borrower agrees to repay the principal amount of \$150,000.00 with interest at the rate of 5.25% per annum over a term of 36 months. Payments shall be made monthly on the 15th day of each month. Late payments will incur a fee of \$25.00.

Signature Areas:

Lender Signature
Click to sign

Borrower Signature
Click to sign

Electronic Signature

Draw Your Signature
Click to draw signature

Or Upload Signature Image
Upload signature

I agree to the terms and conditions of this agreement

Sign Document **Sign Later**

Recent Documents

Document	Type	Status	Date	Actions
Loan Agreement - John Anderson	Contract	Pending Signature	Jan 29, 2026	Sign
Credit Application - Sarah Chen	Application	Signed	Jan 28, 2026	View
Account Opening - Michael Torres	Onboarding	Signed	Jan 27, 2026	View
Mortgage Contract - Rachel Park	Mortgage	Pending Signature	Jan 26, 2026	Sign
Privacy Policy - James Lee	Legal	Signed	Jan 25, 2026	View

RM Tasks, Visits, and Calendar

The RM Tasks, Visits, and Calendar module supports daily activity management for relationship managers. It enables structured task tracking, visit planning, call logging, and reminders, helping RM teams maintain consistent follow up and improve productivity across customer portfolios.

Banking CRM RM Tasks & Calendar
Daily RM activity and visit management

TODAY'S TASKS **12**
5 completed, 7 pending

SCHEDULED VISITS **4**
2 upcoming, 2 completed

CALLS MADE **18**
↑ +6 vs yesterday

FOLLOW-UPS **6**
Due within 24 hours

MEETINGS **3**
Today's schedule

Task List

- Follow up with Amanda Smith regarding loan application
Due: 10:00 AM | Priority: High Urgent
- Prepare documents for Michael Johnson meeting
Due: 11:30 AM | Priority: Medium Medium
- Review Emily Wilson's credit application
Completed at 9:15 AM Done
- Schedule site visit for Robert Brown
Due: 2:00 PM | Priority: High Urgent
- Send contract to Jennifer Davis for review
Due: 3:30 PM | Priority: Low Low

Calendar < January 2026 >

Sun	Mon	Tue	Wed	Thu	Fri	Sat
29	30	31	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

Today's Schedule

- 10:00 AM - TechCorp Meeting
- 2:00 PM - RetailMax Visit
- 4:00 PM - ManufacturingPro Visit

Visit Plan

- TechCorp Industries
123 Business Park, Suite 400
Client Meeting | Contact: Amanda Smith 10:00 AM - 11:00 AM
- GrowthStream Finance
456 Finance Center, Floor 12
Site Visit | Contact: Michael Johnson Completed
- RetailMax Group
789 Retail District, Store #42
Branch Visit | Contact: Emily Wilson 2:00 PM - 3:00 PM
- ManufacturingPro Inc.
321 Industrial Park, Building B
Factory Visit | Contact: Robert Brown 4:00 PM - 5:00 PM

Call Log

- Amanda Smith | 10:15 AM | 12 min Details
- Michael Johnson | 9:30 AM | 8 min Details
- Emily Wilson | 8:45 AM | No answer Retry
- Robert Brown | 4:45 PM | 15 min Details

Upcoming Meetings

- Portfolio Review | David Martinez | 3:00 PM Join
- Team Huddle | RM Team | 4:30 PM Join
- Client Onboarding | Nancy Adams | Tomorrow 10:00 AM Join

Campaign Management

The Campaign Management module supports planning, execution, and monitoring of targeted marketing campaigns. It allows marketing teams to define target segments, select communication channels, and track basic campaign performance, enabling more organized and measurable campaign execution.

Banking CRM Campaign Management
Campaign management and execution

+ Create Campaign Analytics

ACTIVE CAMPAIGNS 12 3 running now	TOTAL SENT 45.2K +12% this month	OPEN RATE 34.8% Industry avg: 28%	CLICK RATE 8.2% +2.1%	CONVERSIONS 1,847 4.1% conversion
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Campaign List

Campaign Name	Target Segment	Channel	Status	Sent	Opened	Clicked	Converted	Actions
✉️ Q1 Product Launch Jan 15 - Jan 29, 2026	High Value Clients	✉️ 📩	Active	5,234	1,847	423	89	👁️ View
✖️ Loan Rate Promotion Jan 10 - Jan 25, 2026	New Leads	📩	Active	3,456	1,234	312	67	👁️ View
💳 Credit Card Upgrade Jan 5 - Jan 20, 2026	Existing Customers	✉️	Completed	8,901	3,456	789	156	👁️ View
💷 Savings Account Promo Jan 1 - Jan 15, 2026	Young Professionals	💬	Completed	6,789	2,345	567	123	👁️ View
↳ Investment Opportunity Dec 28 - Jan 12, 2026	High Net Worth	✉️ 📩	Active	2,345	890	234	45	👁️ View
🏡 Mortgage Renewal Dec 20 - Jan 5, 2026	Mortgage Customers	✉️	Completed	4,567	1,789	456	89	👁️ View
👤 Referral Program Dec 15 - Dec 30, 2025	All Customers	✉️ 📩	Completed	12,345	5,678	1,234	345	👁️ View
📱 Mobile App Promotion Dec 10 - Dec 25, 2025	Digital Users	💬	Completed	7,890	2,890	678	145	👁️ View
🎓 Student Account Offer Dec 5 - Dec 20, 2025	Students	✉️ 📩	Completed	3,456	1,234	345	78	👁️ View
🛡️ Security Awareness Nov 28 - Dec 13, 2025	All Customers	✉️	Completed	15,678	7,890	1,567	234	👁️ View

Showing 1-10 of 45 campaigns

1 2 3 ... 5 >

Target Segments

Manage Segments

2,847 High Value Clients	5,678 New Leads	12,345 Existing Customers	3,456 Young Professionals	1,234 High Net Worth	4,567 Mortgage Customers
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Audience Segmentation

The Audience Segmentation module enables banks to create and manage customer segments based on defined criteria. It supports rule based filtering and segment size preview, allowing marketing and business teams to build targeted audiences for campaigns and customer engagement activities.

Banking CRM Audience Segmentation
Customer segmentation for targeted campaigns

Reset
Save Segment

Segment Name: High Value Active Customers

Description: Customers with >\$100K portfolio and active in last 30 days

Segment Rules Builder

Demographics

Age Range: is between 25 - 65

Income Level: greater than \$75,000 / year

Location: equals New York, NY

Account Activity

Last Login: within last 30 days

Account Age: greater than 6 months

Transaction Volume: greater than 10 transactions / month

Product Holdings

Portfolio Value: greater than \$100,000

Account Type: equals Premium Checking

Product Category: includes Investment Portfolio

Transaction Behavior

Average Transaction: greater than \$500

Transaction Type: equals Online Transfer

Transaction Frequency: greater than 5 / week

Segment Size Preview

Estimated Audience Size
2,847
of 45,234 total customers
6.3% of total customer base

Total Customers	45,234
Matching Customers	2,847
Match Rate	6.3%

Top Characteristics

Avg Portfolio Value	\$156,000
Avg Account Age	3.2 years
Primary Location	New York (45%)
Most Common Product	Investment (78%)

Quick Filters

High Value Customers	1,234
Recently Active	8,567
New Customers	2,345
At Risk Customers	567
Growth Potential	3,456

Save Segment

Save & Use in Campaign

Save as Draft

Segment will be available for all marketing campaigns

Omnichannel Interaction Log

The Omnichannel Interaction Log captures and displays all customer communications across supported channels in a single unified timeline. It provides visibility into calls, emails, and WhatsApp interactions, ensuring that sales and service teams have full context of prior communications when engaging with customers.

Banking CRM Interaction History
Omnichannel interaction history in Customer 360

TOTAL INTERACTIONS **247**
+12 this week

CALLS **89**
36% of total

EMAILS **98**
40% of total

WHATSAPP **45**
18% of total

IN-PERSON **15**
6% of total

John Anderson
CUST-2024-0892

john.anderson@email.com
+1 (555) 234-5678
New York, NY

Filter by Channel

- All Channels**
- Calls**
- Emails**
- WhatsApp**
- In-Person**

Activity Summary

This Week	23 interactions
This Month	87 interactions
Avg Response Time	2.3 hours
Satisfaction Score	4.7/5

Interaction Timeline

All Time

- Call** Jan 29, 2026 - 2:30 PM
Discussed investment portfolio rebalancing and upcoming market opportunities.
Agent: Sarah Chen
- Email** Jan 28, 2026 - 10:15 AM
Sent monthly investment report and portfolio performance summary.
report_jan2026.pdf portfolio_summary.xlsx
From: System
- WhatsApp** Jan 27, 2026 - 4:45 PM
Customer: "Thanks for the quick response on my loan application. When can I expect approval?"
Agent: Michael Torres
- In-Person** Jan 26, 2026 - 11:00 AM
Branch visit - Mortgage consultation and document review.
Location: Main Branch, NY
- Call** Jan 25, 2026 - 3:30 PM
Fraud alert verification - confirmed no suspicious activity on account.

Service Desk and Case Management

The Service Desk and Case Management module provides structured handling of customer service requests and issues. It supports case creation, assignment, SLA tracking, and resolution history, enabling consistent service delivery and improved visibility into service performance.

The screenshot displays the Banking CRM Service Desk interface, featuring a dashboard with key performance indicators (KPIs) and a detailed view of a specific case.

Dashboard KPIs:

- OPEN CASES: 47 (8 High Priority)
- IN PROGRESS: 23 (Active resolution)
- RESOLVED TODAY: 12 (↑ +4 vs yesterday)
- SLA BREACHED: 3 (Needs attention)
- AVG RESOLUTION: 2.1 hrs (↓ -15%)

Case Detail View:

CASE-2026-0892 | High Priority
Unable to access online banking portal
 Customer: John Anderson | Created: Jan 29, 2026 - 9:15 AM

Status: In Progress | Category: Technical Issue

Description: Customer unable to login to online banking portal since yesterday. Receiving "Session expired" error message. Tried clearing cache and cookies but issue persists. Need urgent resolution as customer needs to access account for scheduled payment.

Customer Contact: +1 (555) 234-5678, john.anderson@email.com | Priority Level: High

SLA Status:

Time Remaining: 4h 23m (High Priority)
 Target: 24 hours from creation
 82% of SLA time used

SLA Target: 24 hours | Time Elapsed: 19h 37m | Status: On Track | Resolution Time: 2h 15m

Case Timeline:

- Jan 29, 2026 - 9:15 AM: Case created by John Anderson via phone call. Issue: Unable to access online banking portal. Agent: Support Team (New)
- Jan 29, 2026 - 9:30 AM: Case assigned to Michael Torres (Level 2 Support). Priority set to High. Agent: System (Assigned)
- Jan 29, 2026 - 10:15 AM: Investigation (Investigation)

Assigned Agent:

Michael Torres
 Level 2 Support Specialist | Online
 m.torres@bank.com | +1 (555) 987-6543 | x2345
 Current Workload: 13/20 cases

Quick Actions:

- Call Customer
- Send Email
- WhatsApp Message
- Escalate Case
- Link to Knowledge Base

Related Cases:

- CASE-2026-0876: Password reset request (Resolved)
- CASE-2026-0854: Login issue - mobile app (Resolved)
- CASE-2026-0832: Account verification (Open)

Complaints Management

The Complaints Management module supports formal handling of customer complaints and disputes. It enables complaint registration, investigation tracking, resolution documentation, and regulatory reference logging, helping banks maintain transparent and auditable complaint management processes.

 **Banking CRM Complaints Management**
Complaints and dispute handling

[+ New Complaint](#) [Export](#)

TOTAL COMPLAINTS	OPEN	RESOLVED	ESCALATED	AVG RESOLUTION
156 ↓ -8% this month	23 Under investigation	127 81% resolution rate	6 To regulator	5.2 days ↓ -12%

Complaint Register

Complaint ID	Customer	Category	Investigation Status	Regulatory Ref #	Resolution	Days Open	Actions
CMP-2026-0892	John Anderson CUST-2024-0892	Service Quality	Under Investigation	REG-2026-4523	Pending	3 days	View
CMP-2026-0891	Sarah Chen CUST-2024-0876	Product Issues	Resolved	REG-2026-4522	Refund issued	5 days	View
CMP-2026-0890	Michael Johnson CUST-2024-0865	Fees & Charges	Under Investigation	REG-2026-4521	Pending	2 days	View
CMP-2026-0889	Emily Wilson CUST-2024-0854	Communication	Resolved	REG-2026-4520	Apology sent	7 days	View
CMP-2026-0888	Robert Brown CUST-2024-0843	Service Quality	Escalated	REG-2026-4519	Pending regulator	14 days	View
CMP-2026-0887	Jennifer Davis CUST-2024-0832	Product Issues	Resolved	REG-2026-4518	Product replaced	4 days	View
CMP-2026-0886	David Martinez CUST-2024-0821	Fees & Charges	Under Investigation	REG-2026-4517	Pending	6 days	View
CMP-2026-0885	Nancy Adams CUST-2024-0810	Communication	Resolved	REG-2026-4516	Process updated	3 days	View
CMP-2026-0884	Paul Turner CUST-2024-0799	Service Quality	Resolved	REG-2026-4515	Training provided	8 days	View
CMP-2026-0883	Rachel Park CUST-2024-0788	Product Issues	Under Investigation	REG-2026-4514	Pending	4 days	View

Showing 1-10 of 156 complaints

[1](#) [2](#) [3](#) [...](#) [16](#) [Next](#)

 **Complaints by Category**

Category	Count
Service Quality	55
Product Issues	44
Fees & Charges	34
Communication	23

 **Resolution Summary**

Category	Value
Resolved	127
Resolution Rate	81%
Avg Days	5.2
Satisfaction	4.7

Common Resolutions

Refund (34) | Apology (28) | Process Update (23) | Training (18) | Product Replace (12)

Consent and Privacy Management

The Consent and Privacy Management module supports management of customer communication preferences and privacy related requests. It enables tracking of channel consent, consent history, and privacy request logs, helping banks support compliant communication and data handling practices.

Banking CRM Consent & Privacy

Consent and communication preferences

Save Changes
Reset

TOTAL CUSTOMERS
45,234
Active consent

EMAIL OPT-IN
38,456
85% of total

SMS OPT-IN
31,234
69% of total

WHATSAPP OPT-IN
28,567
63% of total

PRIVACY REQUESTS
23
Pending

Channel Consent Preferences

Manage communication consent for customer: John Anderson (CUST-2024-0892)

Email Communications	Marketing, updates, and service notifications	<input checked="" type="checkbox"/>
SMS Messages	Transactional alerts and promotional offers	<input checked="" type="checkbox"/>
WhatsApp	Quick support and promotional messages	<input checked="" type="checkbox"/>
Phone Calls	Service calls and telemarketing	<input type="checkbox"/>
Direct Mail	Physical mail and promotional materials	<input type="checkbox"/>
Push Notifications	Mobile app notifications	<input checked="" type="checkbox"/>
Third Party Sharing	Data sharing with partners	<input type="checkbox"/>
Analytics & Personalization	Usage tracking and personalized offers	<input checked="" type="checkbox"/>

Privacy Request Log

[View All](#)

Data Access Request	Jan 29, 2026
Customer requested full data export	REQ-2026-0892
Processing	
Data Deletion Request	Jan 28, 2026
Account closure and data removal	REQ-2026-0891
Completed	
Consent Withdrawal	Jan 27, 2026
Marketing communications opt-out	REQ-2026-0890
Completed	
Data Portability	Jan 26, 2026
Export to third-party service	REQ-2026-0889
Completed	
Right to Object	Jan 25, 2026
Objection to automated processing	REQ-2026-0888
Under Review	

Consent History

[View All](#)

Email consent granted	Jan 29, 2026 - 10:30 AM Customer action
SMS consent granted	Jan 29, 2026 - 10:28 AM Customer action
Phone calls consent revoked	Jan 28, 2026 - 3:45 PM Customer action
WhatsApp consent granted	Jan 27, 2026 - 11:15 AM Customer action
Push notifications consent granted	

GDPR Compliance

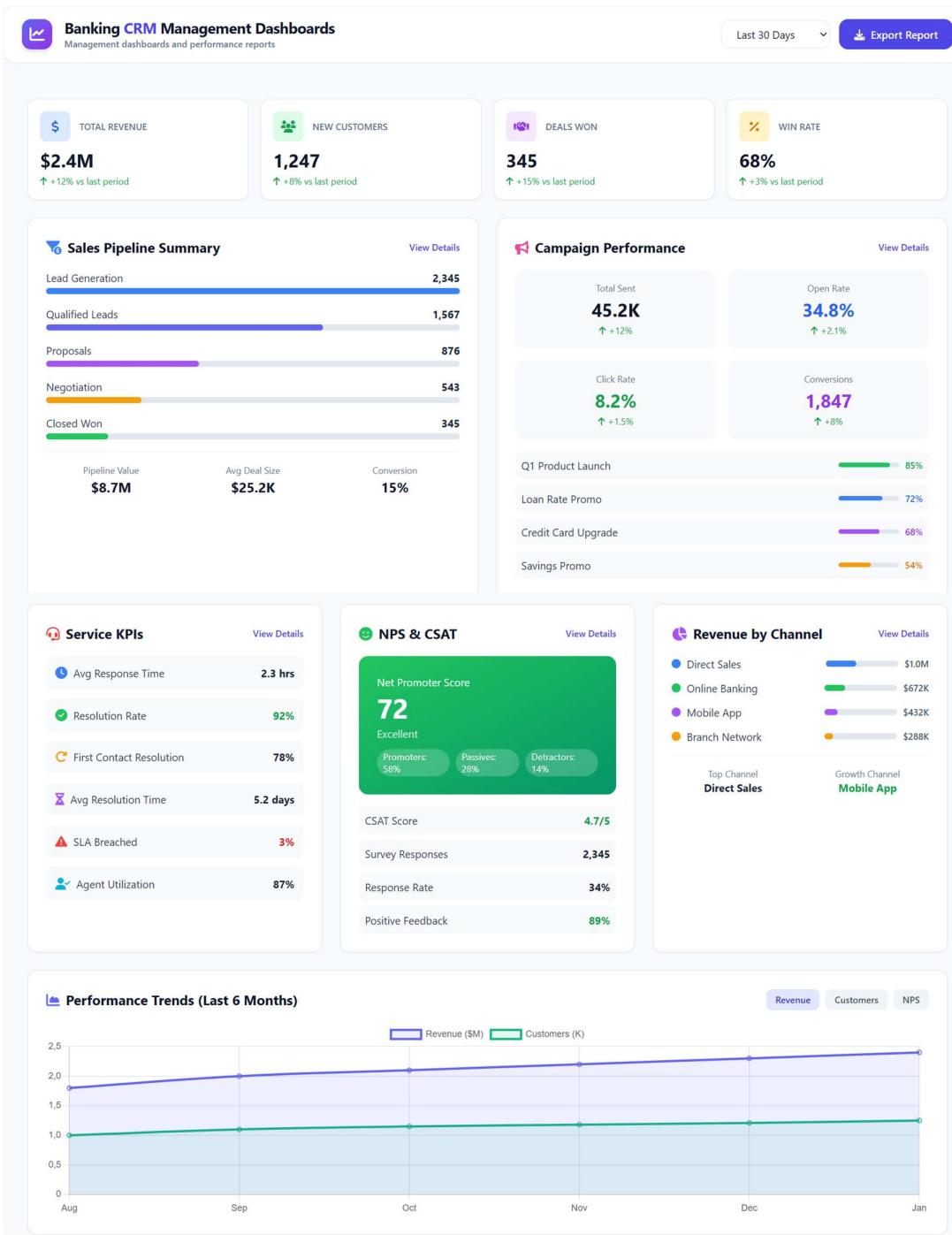
Consent Record Retention	5 years
Data Access Response Time	30 days
Deletion Response Time	30 days
Consent Validity Period	2 years
Last Consent Review	Jan 15, 2026

Quick Actions

Export Customer Data
 Initiate Data Deletion
 Refresh Consent Status

Dashboards and Management Reports

The Dashboards and Management Reports module provides consolidated visibility into key sales, service, and campaign metrics. It supports management dashboards, pipeline summaries, service KPIs, and customer satisfaction indicators, enabling data driven monitoring and performance management.



Integration Status and Integration Hub

The Integration Status and Integration Hub module provides visibility into system integrations and data synchronization. It enables monitoring of connected systems, connection status, and last synchronization time, helping IT and operations teams ensure reliable data exchange between CRM, core banking, and channel systems.

The screenshot displays the 'Banking CRM Integration Hub' interface. At the top, there are summary statistics: **TOTAL SYSTEMS: 24 Connected**, **ACTIVE: 21 (87% online)**, **SYNCED TODAY: 18 (Last 24 hours)**, **ERRORS: 2 (Needs attention)**, and **PENDING: 1 (Awaiting sync)**. Below this is a section titled 'Connected Systems' with a table of 12 entries. Each entry includes a system icon, name, status (Connected/Operational/Error), last sync time, status (Operational/Connection Failed), latency, and 'Test' and 'Logs' buttons. The systems listed are: Core Banking System (Mainframe Integration), Payment Gateway (Transaction Processing), CRM System (Customer Management), Email Service (Communication Hub), SMS Gateway (Messaging Service), WhatsApp API (Chat Integration), Analytics Platform (Data Analytics), Document Management (File Storage), Identity Provider (Authentication), Compliance System (Regulatory), Fraud Detection (Security), and Loan Origination (Lending System). At the bottom, a 'Recent Sync Activity' section shows a list of sync events with status icons and details: Core Banking System synced successfully (Jan 29, 2026 - 10:30 AM | 2,345 records processed), Payment Gateway synced successfully (Jan 29, 2026 - 10:28 AM | 1,234 transactions processed), Document Management sync failed (Jan 28, 2026 - 4:30 PM | Connection timeout), and CRM System synced successfully (Jan 29, 2026 - 10:25 AM | 856 records processed). A 'View All' button is at the top right of this section.

System	Type	Status	Last Sync	Status	Latency	Action	Action
Core Banking System	Mainframe Integration	Connected	Jan 29, 2026 - 10:30 AM	Operational	45ms	Test	Logs
Payment Gateway	Transaction Processing	Connected	Jan 29, 2026 - 10:28 AM	Operational	32ms	Test	Logs
CRM System	Customer Management	Connected	Jan 29, 2026 - 10:25 AM	Operational	28ms	Test	Logs
Email Service	Communication Hub	Connected	Jan 29, 2026 - 10:22 AM	Operational	156ms	Test	Logs
SMS Gateway	Messaging Service	Connected	Jan 29, 2026 - 10:20 AM	Operational	89ms	Test	Logs
WhatsApp API	Chat Integration	Connected	Jan 29, 2026 - 10:18 AM	Operational	67ms	Test	Logs
Analytics Platform	Data Analytics	Connected	Jan 29, 2026 - 10:15 AM	Operational	234ms	Test	Logs
Document Management	File Storage	Error	Jan 28, 2026 - 4:30 PM	Connection Failed	-	Retry	Logs
Identity Provider	Authentication	Connected	Jan 29, 2026 - 10:12 AM	Operational	41ms	Test	Logs
Compliance System	Regulatory	Connected	Jan 29, 2026 - 10:10 AM	Operational	78ms	Test	Logs
Fraud Detection	Security	Connected	Jan 29, 2026 - 10:08 AM	Operational	112ms	Test	Logs
Loan Origination	Lending System	Pending	Jan 28, 2026 - 6:00 PM	Awaiting Sync	-	Test	Logs

Workflow Configuration

The Workflow Configuration module enables banks to configure business processes and approval flows within the CRM. It supports workflow rules, approval routing, and SLA rule setup, allowing banks to align CRM processes with internal SOP and operational policies without heavy customization.

The screenshot displays the Banking CRM Workflow Configuration interface. At the top, there is a header with the Rayterton Apps logo and the Banking CRM product name. Below the header, a main dashboard provides an overview of workflow metrics:

- ACTIVE WORKFLOWS:** 18 (All operational)
- PENDING APPROVALS:** 23 (Awaiting action)
- SLA RULES:** 12 (Configured)
- AVG APPROVAL TIME:** 4.2 hrs (Down 8%)
- SLA COMPLIANCE:** 94% (On track)

Below the dashboard, there are two main sections:

- Workflow Rules:** This section lists six active workflows:
 - WF-001 Loan Approval Workflow:** Active. Description: Automated loan approval routing based on loan amount and customer credit score. Approval levels: 3, SLA: 24h, Auto-escalate.
 - WF-002 Account Opening Workflow:** Active. Description: New customer account creation with KYC verification and compliance checks. Approval levels: 2, SLA: 48h, KYC required.
 - WF-003 Credit Card Application:** Active. Description: Credit card application processing with income verification and risk assessment. Approval levels: 2, SLA: 72h, Risk check.
 - WF-004 Mortgage Application:** Active. Description: Complex mortgage approval with property verification and underwriting. Approval levels: 4, SLA: 14 days, Property check.
 - WF-005 Complaint Resolution:** Active. Description: Customer complaint handling with escalation to regulatory compliance. Approval levels: 3, SLA: 5 days, Escalate.
 - WF-006 Fraud Investigation:** Paused. Description: Fraud detection. Approval levels: 2.
- SLA Rules:** This section lists six SLA rules:
 - Loan Approval:** 24 hours. Escalate after 18h, Notify at 12h.
 - Account Opening:** 48 hours. Escalate after 36h, Notify at 24h.
 - Credit Card:** 72 hours. Escalate after 48h, Notify at 24h.
 - Complaint Resolution:** 5 days. Escalate after 3 days, Notify at 2 days.
 - Fraud Investigation:** 24 hours. Escalate after 12h, Immediate notify.
 - Mortgage Application:** 14 days. Escalate after 10 days, Notify at 7 days.

On the right side, there are two more sections:

- Quick Templates:** Manage simple and standard approval templates.
- Recent Activity:** View a list of recent events:
 - Loan approved for John Anderson (10 min ago)
 - Account opening pending approval (25 min ago)
 - Sarah Chen assigned to WF-002 (1 hour ago)
 - WF-003 configuration updated (2 hours ago)
 - SLA breach detected: WF-006 (3 hours ago)

At the bottom of the interface, there is a footer with the text "Visit Us : raytertonacademy.com | rayterton.com" and a page number "16".

Glossary

API (Application Programming Interface)

A technical interface that allows different systems to securely connect and exchange data.

BI (Business Intelligence)

Tools and reports used to analyze business data and support decision making.

CRM (Customer Relationship Management)

A system used to manage customer data, interactions, sales, and service activities.

CSAT (Customer Satisfaction Score)

A metric used to measure how satisfied customers are with a service or interaction.

CTA (Call to Action)

A prompt that encourages users to take a specific action, such as requesting a demo or trial.

CBS (Core Banking System)

The main banking system that manages customer accounts, balances, and transactions.

e Sign (Electronic Signature)

A digital method for signing documents electronically.

e KYC (Electronic Know Your Customer)

A digital process to verify customer identity for regulatory and compliance purposes.

IT (Information Technology)

Technology systems, software, and infrastructure used to support business operations.

KPI (Key Performance Indicator)

A measurable value used to evaluate performance of business activities.

NPS (Net Promoter Score)

A customer loyalty metric based on how likely customers are to recommend a service.

RM (Relationship Manager)

A bank officer responsible for managing and growing customer relationships.

SLA (Service Level Agreement)

A defined service performance target, such as response or resolution time.

SSO (Single Sign On)

A login method that allows users to access multiple systems with one set of credentials.

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