Retail Website New Account Kit Process

📨 STEP 1 — Watch for the New Account Email

When a customer submits an online account request, your branch email will receive a notification.

📬 Email Address Example
BranchNameNewAccounts@psbank.net

Inside the email will be a **direct link to the submission in the Antilles system.**

👉 Click the link to open the application.

🔐 STEP 2 — Log Into Antilles

If prompted to log in:

Username:
Your Prairie State email address
Example: hpatterson@psbank.net

Once logged in for the first time, you will typically access submissions directly through the email links.

⚠️ **If you experience login issues, please contact Hilary.**

📂 STEP 3 — Open the Submission

After logging in, you should be directed to the:

New Account Submissions Page

If you land on the main dashboard instead:

➡ Go to the **LEFT TOOLBAR** ➡ Click **Applications**

🚨 **Important -** DO NOT click the large icon in the middle of the screen — this will generate an error.

👀 STEP 4 — View Customer Details

Locate the submission you need.

On the far right under **Options**, click:

👉 **View** This will display the customer's full application information.

At this point you can:

- copy the information
- print the screen if needed

🚨 **Important Reminder - DO NOT close this screen yet.** You still need the information for the tracking log.

📝 STEP 5 — Log the Submission

All submissions must be logged for **audit and tracking purposes.**

Navigate to:

📍 **Retail Page on ALICE**
📊 **OLB Account Kit Excel Tracker** – *This is the shared Excel log*

Enter the customer information from the application and your name.

Important Fields

Please ensure the following are completed:

- Customer information
- Branch location
- Submission date
- Employee referral (if listed)

Suspicious Submissions

If the request appears fake or fraudulent:

➡ Select **Fake Request** in the **Notes** section.

🔄 STEP 6 — Update the Outcome Later

After speaking with the customer and determining the outcome, return to the Excel log and update the status.

Select:

✅ **Open** – account opened
❌ **Customer Did Not Proceed**
⚠️ **Fake Request**

📦 STEP 7 — FINAL STEP — Archive the Submission

Once the information has been logged:

1️⃣ Return to the **New Account Submissions page**
2️⃣ Locate the application
3️⃣ Click **Archive**
4️⃣ Select **OK**

This keeps the system organized and prevents duplicate work.

⏳ Important System Limitation

Archived submissions remain available for **7 days only** before they are automatically removed from the system.

⭐ Customer Contact Expectations

Whenever possible: 📞 **Contact the customer the same business day** OR

📞 **By the first half of the next business day**

Quick response significantly increases the likelihood of opening the account.

🚫 Before Creating a CIF

Do **NOT** build a CIF until you have:

✓ Spoken with the customer
✓ Confirmed their information
✓ Selected the correct account type
✓ Scheduled a branch visit

This prevents unnecessary CIF creation and wasted time.

🏆 The Goal

Every online request should feel like the customer just **walked into our branch.**

Fast response + excellent service = **new Prairie State relationships.**