

CBS Client Coding Guideline

Client Type	Coding Guideline
Clients under TCG and Subsidiary Sponsorship	<ol style="list-style-type: none"> 1. Maximum 3 letters code 2. First Letter of Each word of the company trade name <p>For E.g.: Company Name: McFarlane Telfer Refrigeration & Kitchen Equipment Trading LLC Company Code : MTR</p>
Clients not under TCG and Subsidiary Sponsorship	<ol style="list-style-type: none"> 1. Maximum 4 letters code 2. Code start with letter "X" and then first Letter of Each word of the company trade name <p>For E.g.: Company Name: McFarlane Telfer Refrigeration & Kitchen Equipment Trading LLC Company Code : XMTR</p>
Clients under Outsourced Sponsorship	<ol style="list-style-type: none"> 1. Maximum 4 letters code 2. Code start with letter "K" and then first Letter of Each word of the company trade name <p>For E.g.: Company Name: McFarlane Telfer Refrigeration & Kitchen Equipment Trading LLC Company Code : KMTR</p>
Walk in Clients (Individuals)	<p><u>Existing practice</u></p> <ol style="list-style-type: none"> 1. Code is PER with 3 numbers <p>For E.g.: Individual Name: Hesham Hashim Hashim Company Code : PER001</p> <p><u>New practice</u></p> <ol style="list-style-type: none"> 1. Maximum 4 letters code 2. Code start with letter "P" and then first Letter of Each word of the Individual name as per passport <p>For E.g.: Individual Name: Hesham Hashim Hashim Company Code : PHHH</p>
Client Temporary coding (Only in case of lead to customer conversion for new business setup)	<p>Code start with word "Temp" and then first Letter of Each word of the proposed company trade name</p> <p>For E.g.: Proposed company Name: McFarlane Telfer Refrigeration & Kitchen Equipment Trading LLC Company Code : TEMPMTR</p> <p>Note: Task/Email to account owner to insert the actual code should be triggered when the Job Order of New Business set up reaches the stage "Closure Preparation" and submit for approval</p>
Business Partner	Not applicable