banza
make IT easy

Corporate Lending for Creatio

Setup instruction

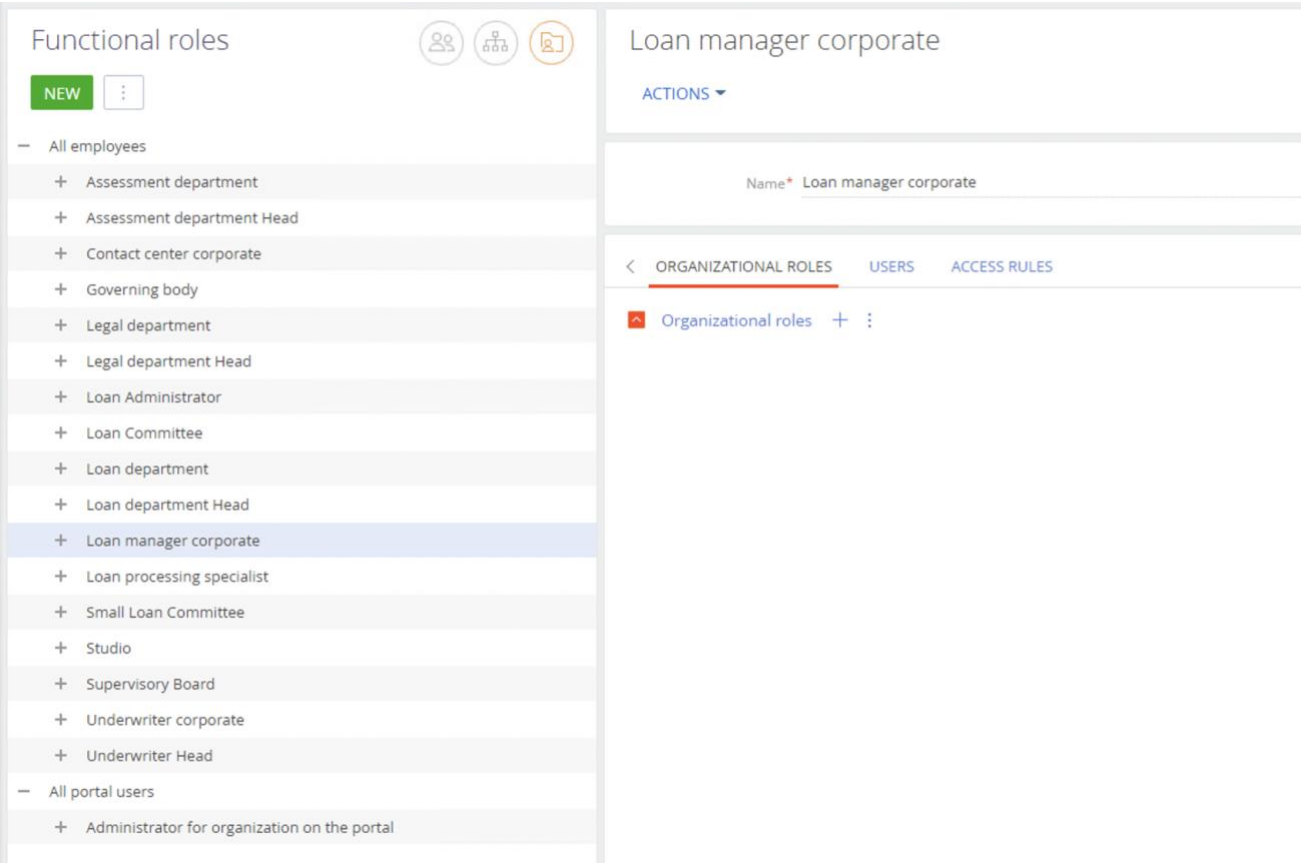
info@banzait.com
banzait.com

Add System users 3
Set up the Consultation panel 4
Set up the Documents package 5
Set up the Product 6
Set up the Consideration route 7
Set up the Matrix of limits and authorities 8

Add System users

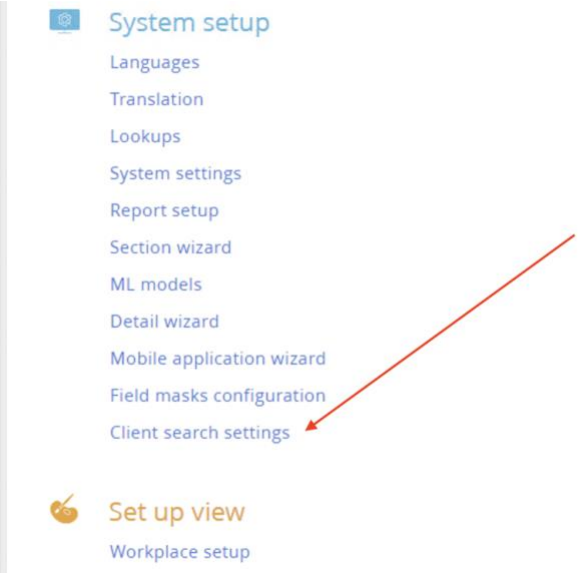
Create users who will participate in the loan process and assign them the appropriate functional roles:

- Loan manager corporate
- Assessment department
- legal department
- Loan department
- Underwriter corporate
- Small Loan Committee
- Loan Committee
- Governing body
- Supervisory Board
- Loan Administrator

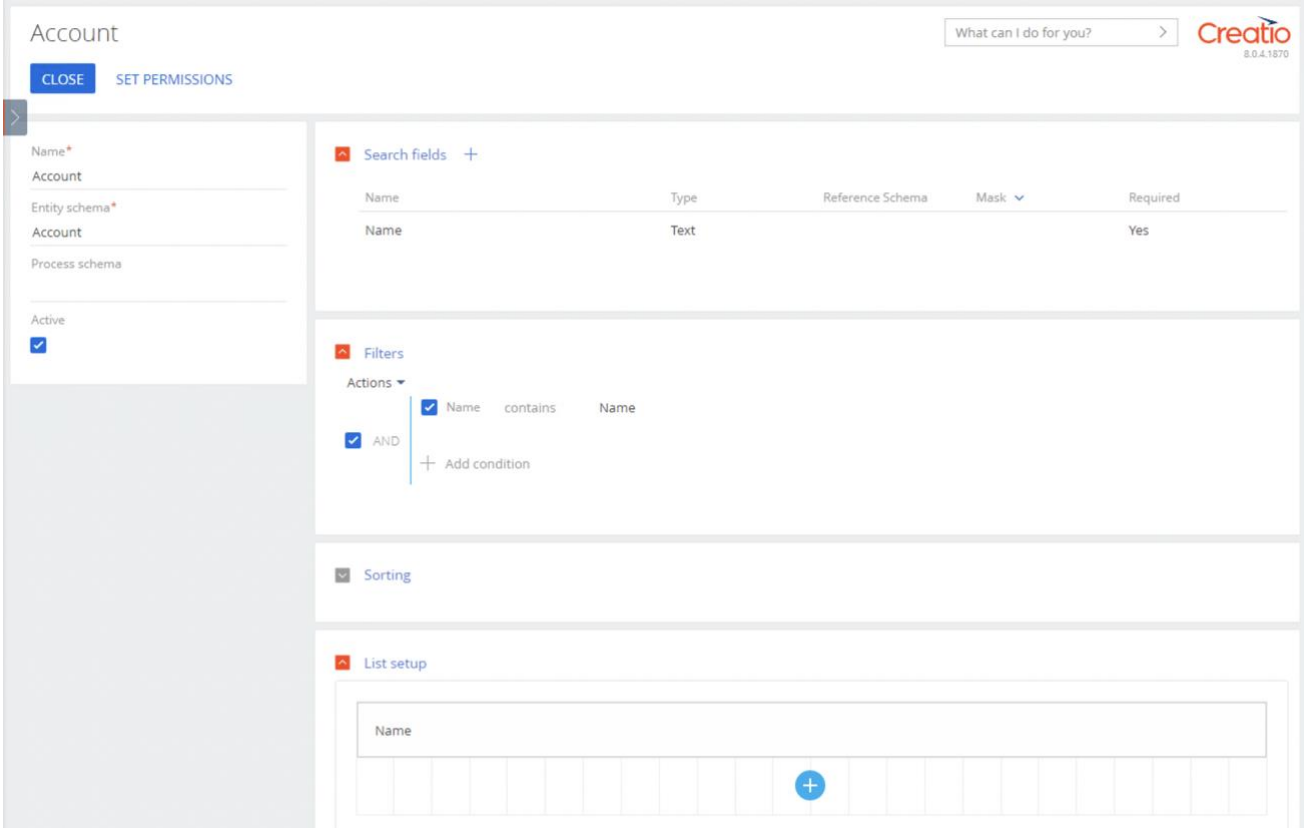


Set up the Consultation panel

1. Go to the [Client search sittings].

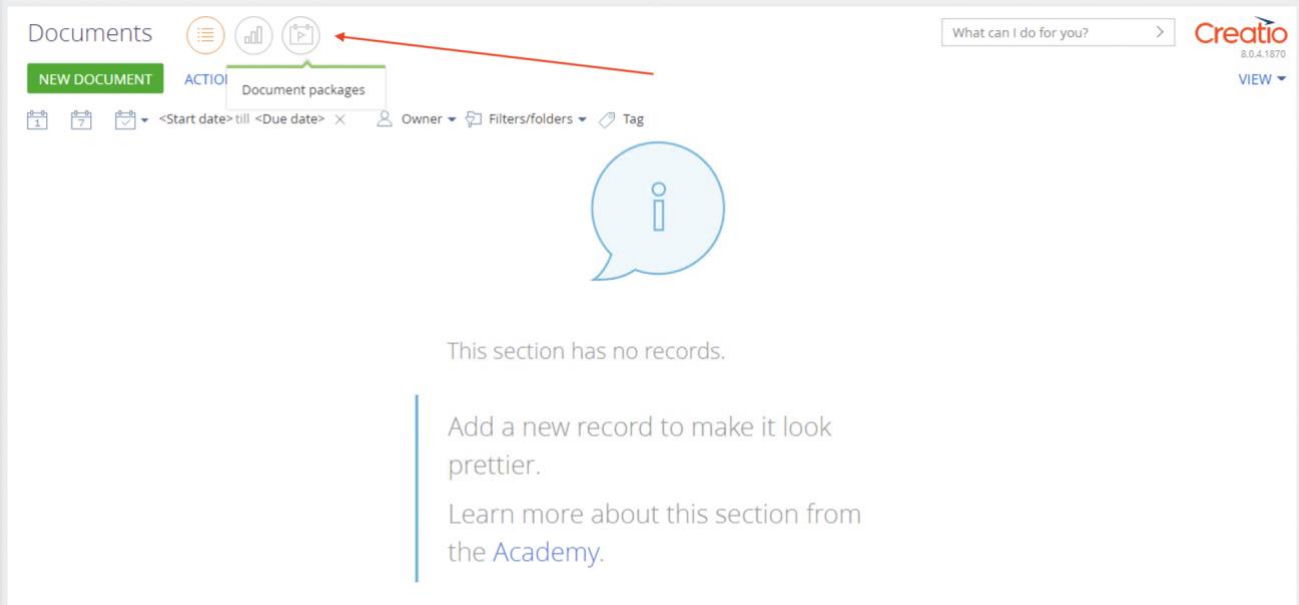


2. Configure customer search fields, filter conditions, and display columns.

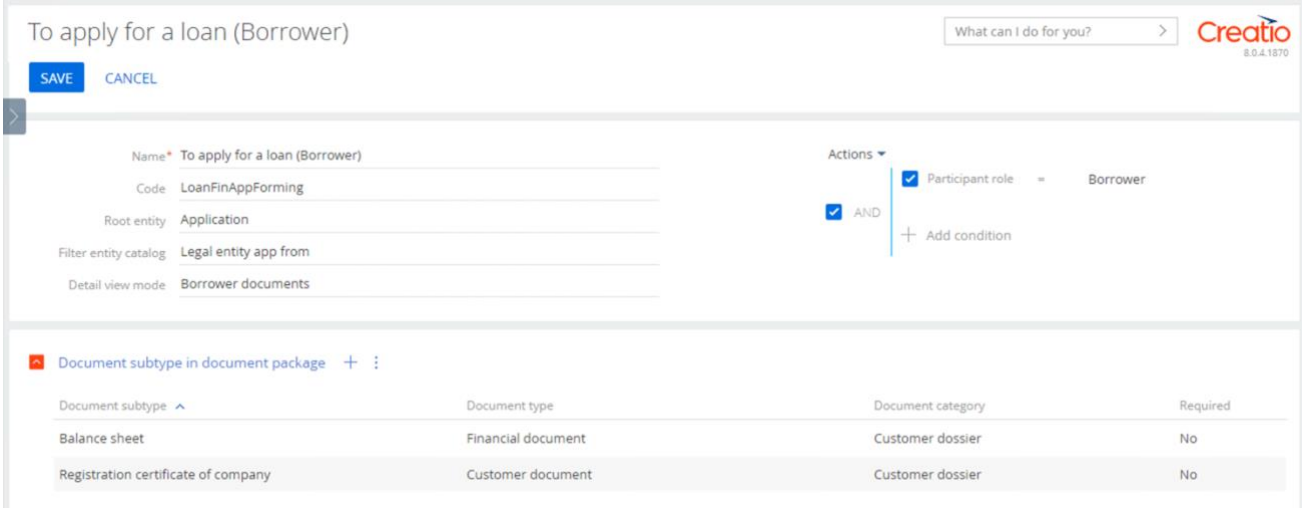


Set up the Documents package

1. Fill in the dictionaries [Document category], [Document type] and [Document subtype].
2. Go to the [Documents] section [Document packages] view.



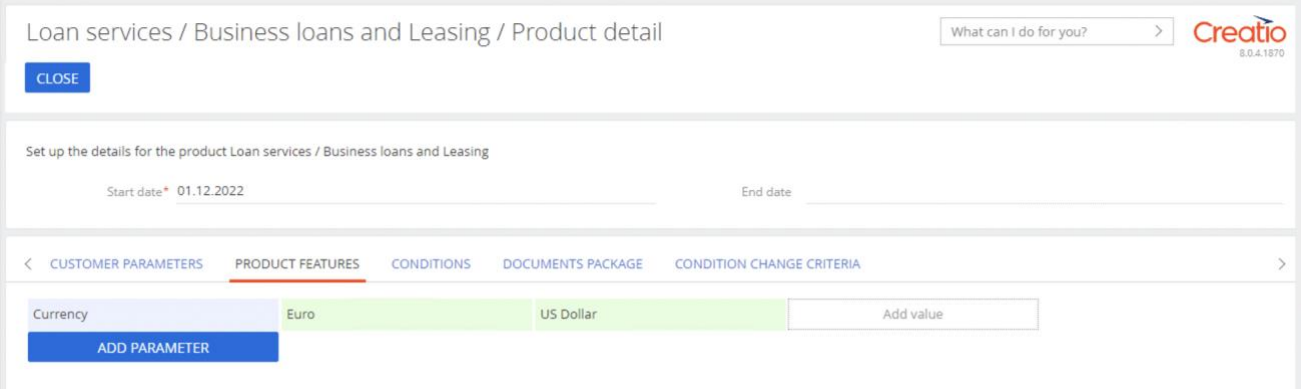
3. Create the documents package and fill in the display conditions.



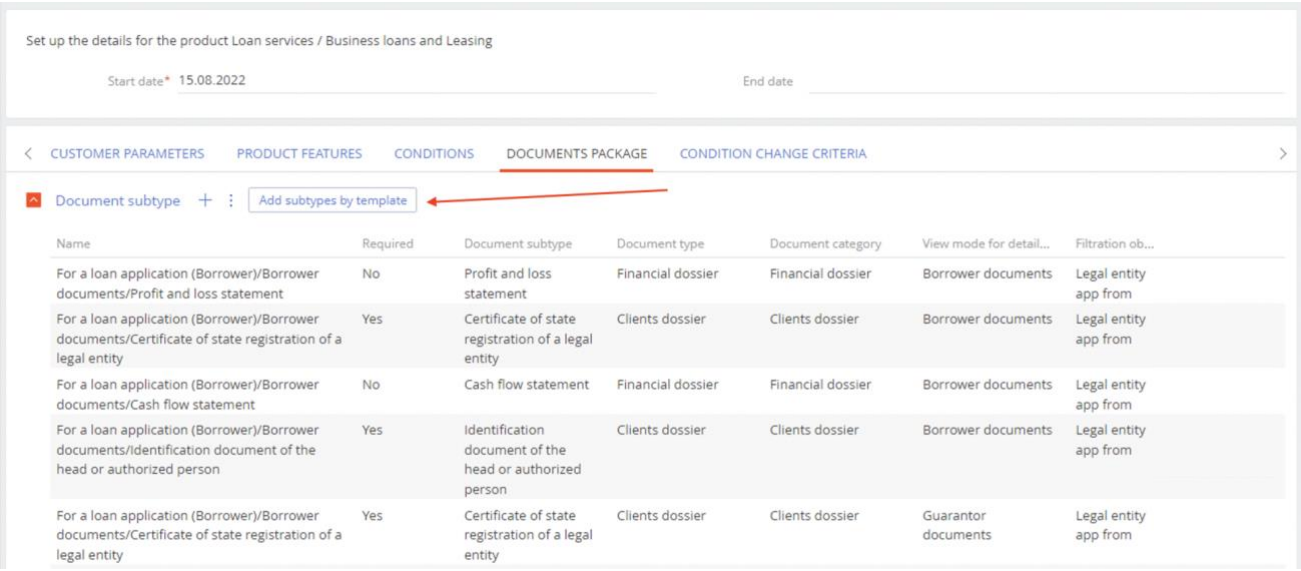
Set up the Product

1. Go to the [Product] section.
2. Create a product for Business loans and Leasing.

3. Choose Available for = Legal entity.
4. Add [Product details].
5. Fill [Product features] and [Conditions].

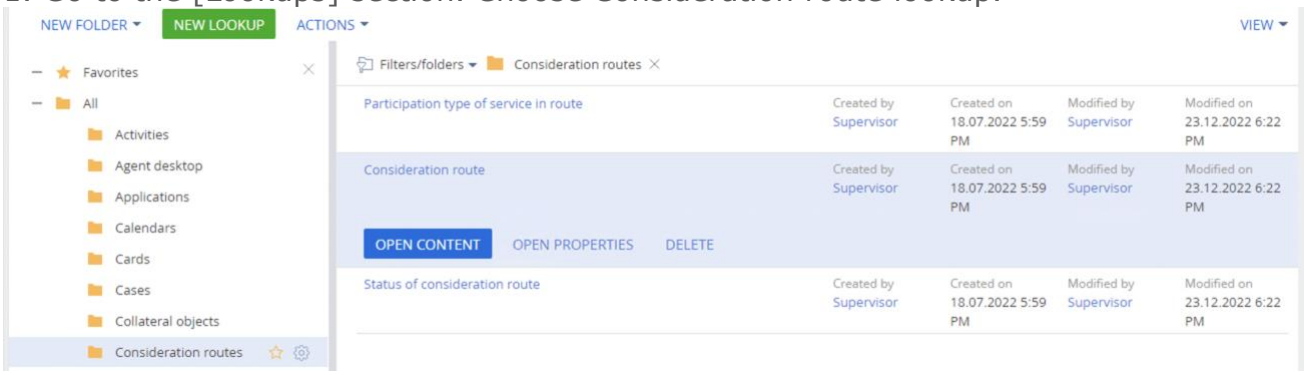


6. Add in [Documents package] subtypes of documents by template.

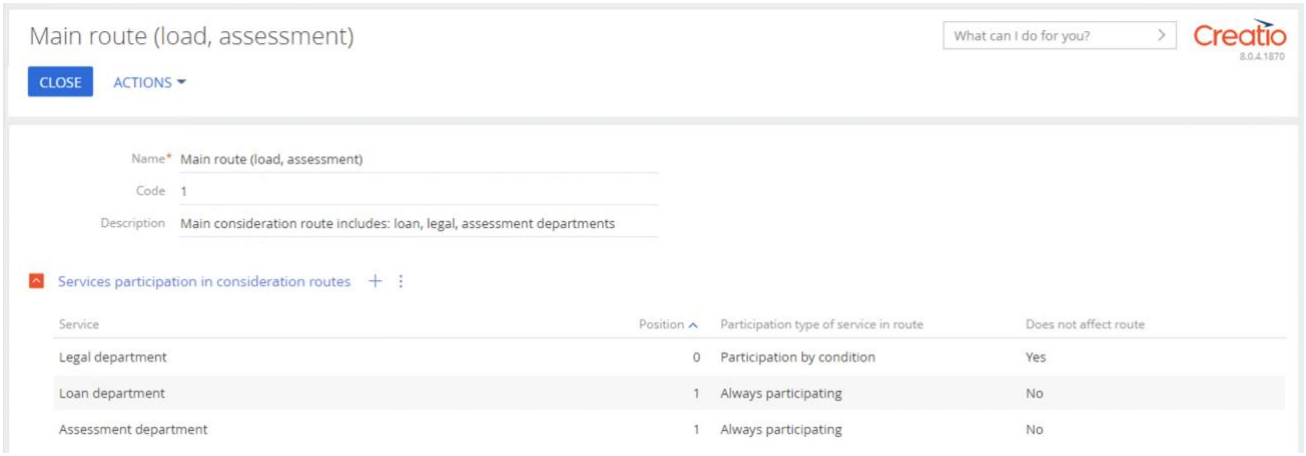


Set up the Consideration route

1. Go to the [Lookups] section. Choose Consideration route lookup.



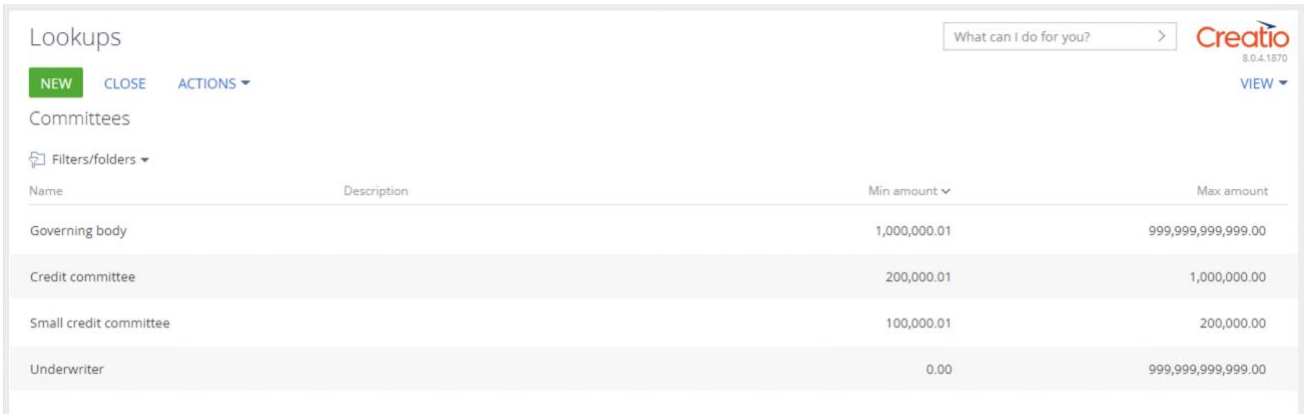
2. Create the needed count of routes and fill in the services participation involved in the consideration of the application.

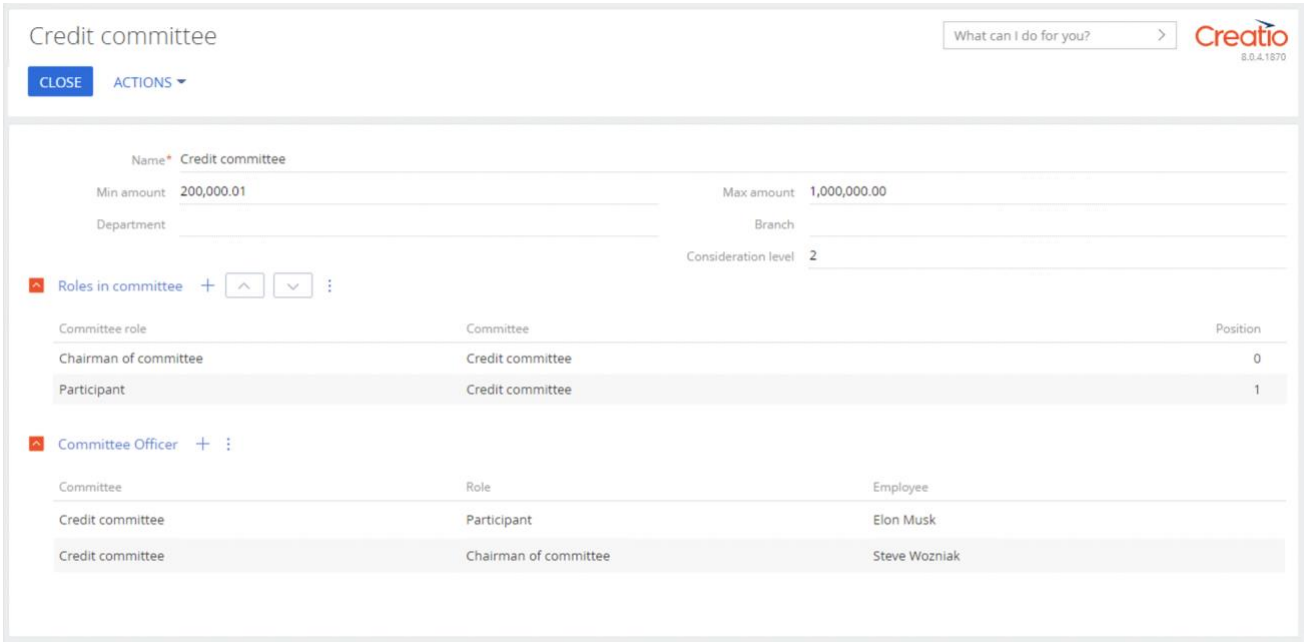


Set up the Matrix of limits and authorities

Specify the authorities that approve the draft decision on the loan transaction in the [Project] directory and their approval limits.

1. Go to the [Lookups] section. Choose Committees lookup.



2. Create the needed count of committees that approve the draft decision on the loan.

3. Fill in approval limits and the participants of committee.