



Segment Checker User manual – Limit and guarantee approval

Guarantee Management System

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1 Introduction

This user manual is designed to help you quickly get acquainted with basic tasks of Guarantee Management System's segment checker.

1.1 Audience

This manual is intended for the following User Roles:

Role	Function
Segment Checker	Approval of new and modified guarantees, limits, generating different kinds of report at his/her segment level

2 Dashboard

After you have successfully logged into Guarantee Management System as segment checker, the screen on Figure 1 will be displayed.



Figure 1: Segment Check's Dashboard

2.1 Menus

- Clicking M1 in Figure 1 will display the segment checker's dashboard, as illustrated in Figures 1
- Clicking M2 in Figure 1 will display sub menus of segment guarantee approvals, as illustrated in Figure 5.
- Clicking M3 in Figure 1 will display sub menus of segment limit approvals, as illustrated in Figure 18.
- Clicking M4 in Figure 1 will display sub menus of segment report, as illustrated in Figure 26.

2.2 Segment Checker's Dashboard

- D1 displays the total number of new limits that needs approval within the user's segment.
- D2 displays the total number of modified limits that needs approval within the user's segment.
- D3 displays the total number of new guarantee that needs approval within the user's segment.
- D4 displays the total number of modified guarantees that needs approval within the user's segment.

2.3 Info

- R in Figure 1 displays the role of the user logged in
- B in Figure 1 displays the branch or unit of the user logged in
- N in Figure 1 is notification bell that displays if there are new notifications.
- U in Figure 1 displays username of the user logged in and clicking it will display menus as shown in Figure 3.

NB: Clicking the U in Figure 1 will display all notification as shown in the Figure 2

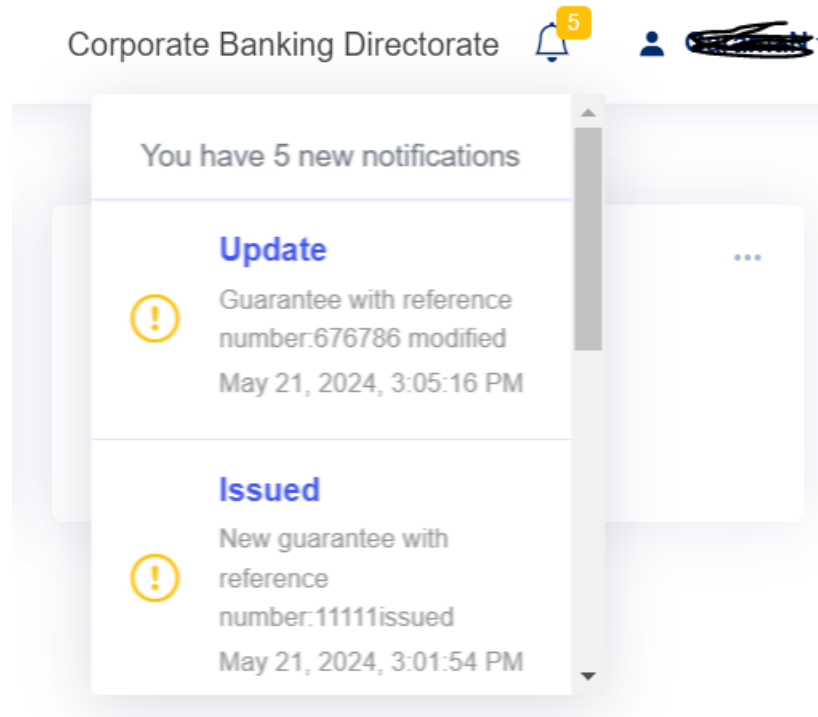


Figure 2: Segment Checker's Notifications

3 Sign-out and Get Help

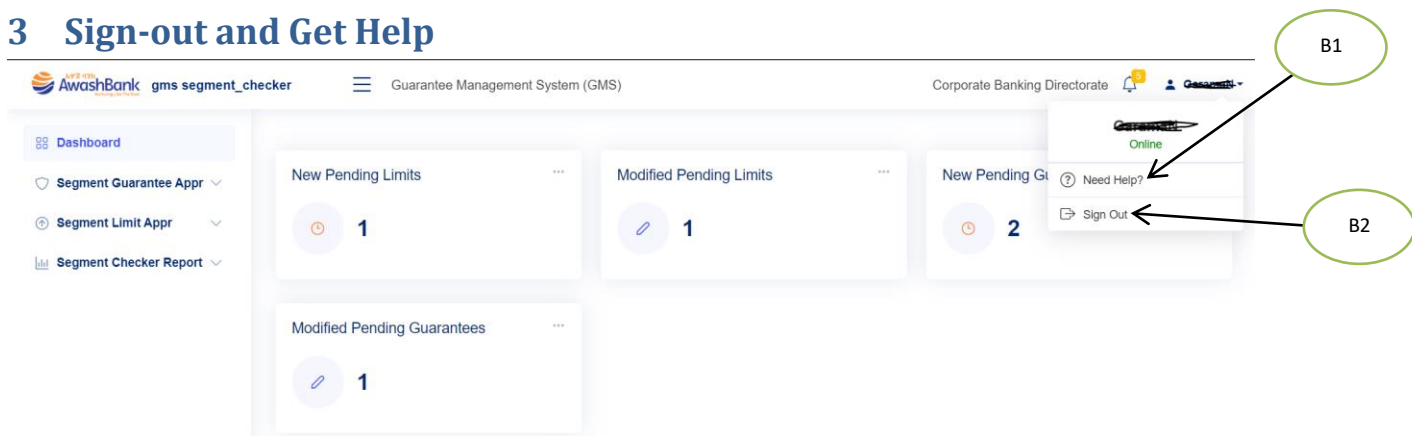


Figure 3: Help and Logout

3.1 Actions

- Clicking “Need Help?” button B1 in Figure 3 will download this manual in pdf format on new tab of your browser.
- Clicking “Sign Out” button B2 in Figure 3 will logout the user from the system by redirecting the user to login page.

4 Approval Links to Details from Dashboard

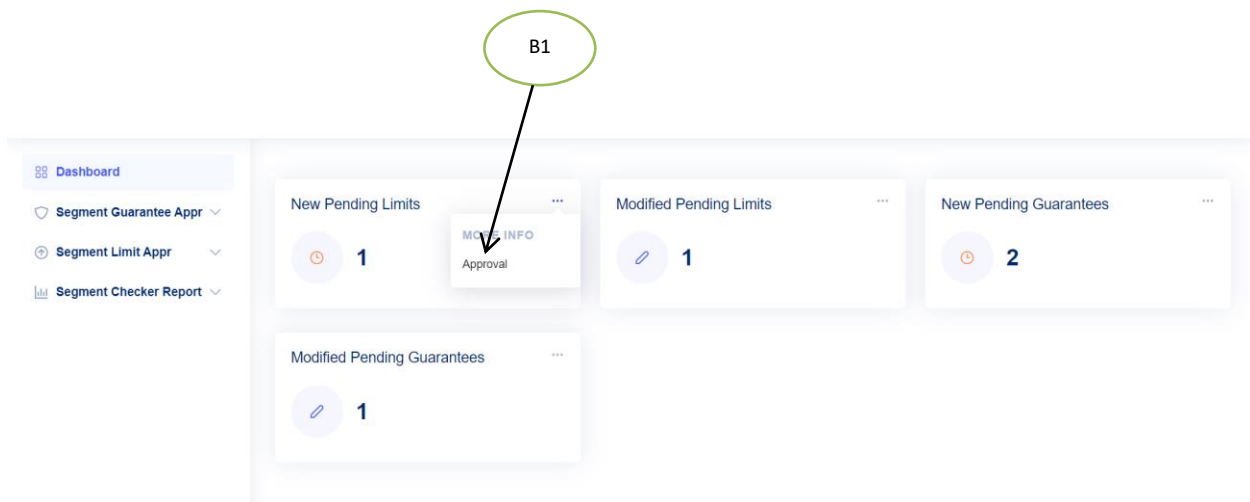


Figure 4: Approval link from dashboard

4.1 Actions

- Clicking the three dots on D1, D2, D3 and D4 of dashboard in Figure 1 will display links as shown in Figure 4.
- Clicking the link button B1 in Figure 4 will take you to the respective details of all requests.

NB: Same for all dashboard cards (D1, D2, D3 and D4 in Figure 1)

5 Segment Guarantee Approval Management

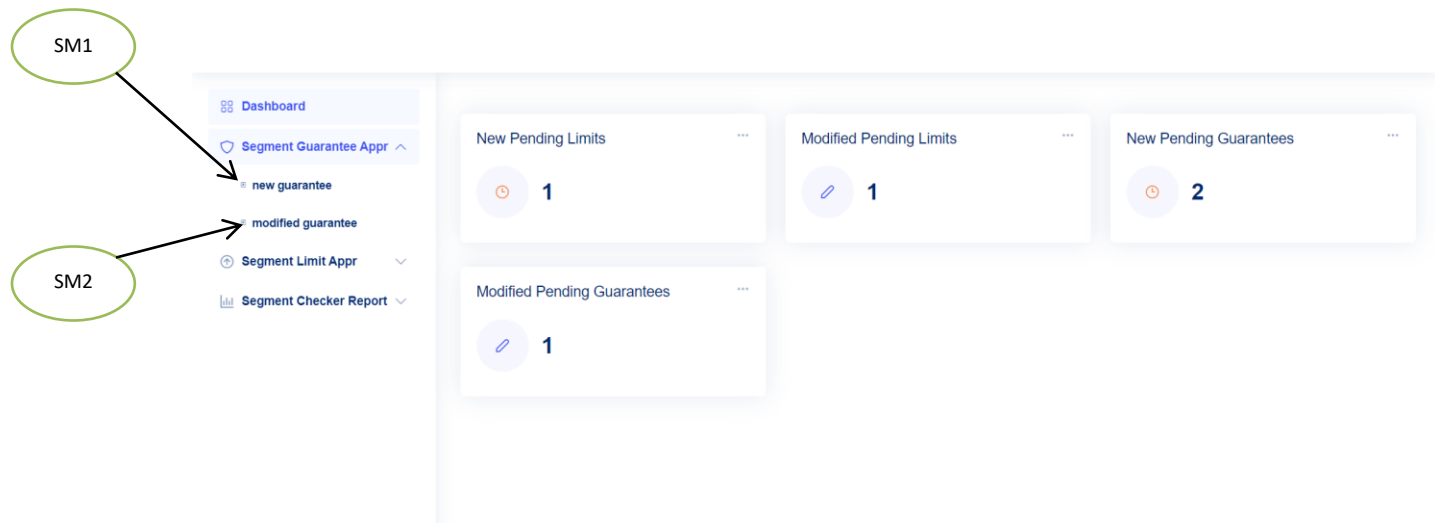


Figure 5: Guarantee Approvals Sub-Menus

5.1 Sub-Menus

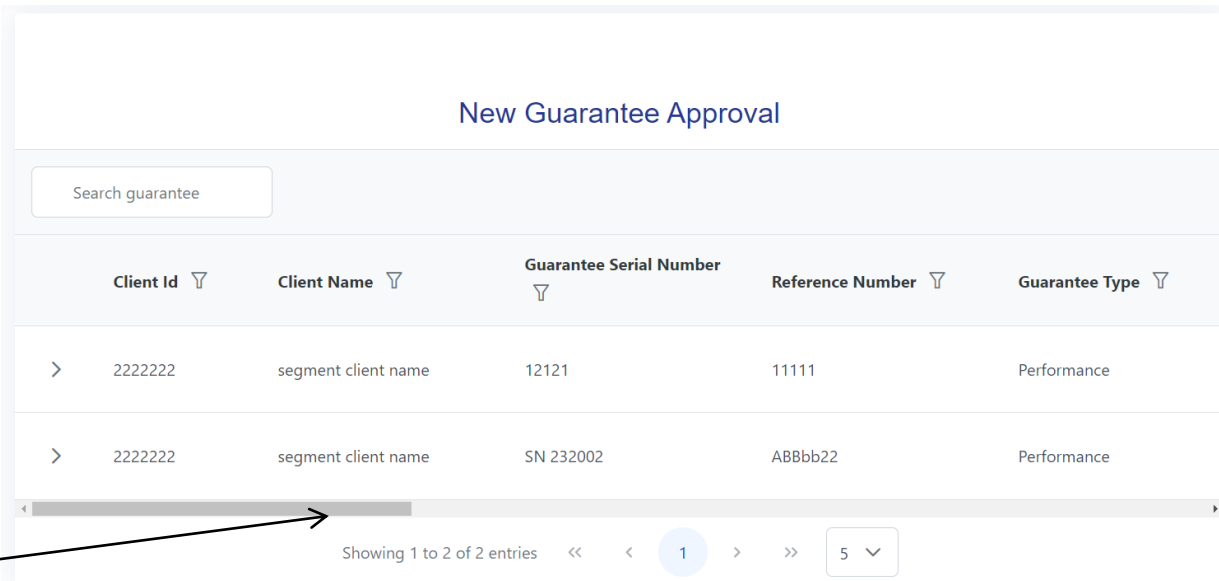
- Clicking Sub-Menu SM1 of M2 (menu in Figure 1) in Figure 5 will display the screen shown in Figure 6.
- Clicking Sub-Menu SM2 of M2 (menu in Figure 1) in Figure 5 will display the screen shown in Figure 13.

5.2 New Guarantee Approval

5.2.1 Actions

- Scrolling horizontal scroll S1 in Figure 6, will display details and actions as shown in Figure 7.
- Clicking button B1 in Figure 7, will display buttons B2, B3, and B4 as shown in Figure 7.
- Clicking “details” button B2 in Figure 7 will display details of guarantee issued as shown in Figure 8.
- Clicking the "Authorize" button (B3 in the Figure 7) will display a confirmation dialog as shown in Figure 9. To approve the selected new guarantee issued request, click the "Yes" button (B1 in Figure 9). To cancel the action, click the "No" button (also in Figure 9).
- Clicking the "Reject" button (B4 in the Figure 7) will pop up and display a rejection form as shown in Figure 10. To reject/return the selected new guarantee issued request, click the "Save" button (B1 in Figure 10) by writing rejection remark. To cancel the action, click the "Cancel" button (also in Figure 10).
- Clicking button B1 in Figure 11 will display buttons B2 and B3 as shown in Figure 11

- Clicking “preview” button B2 in Figure 11, will display pdf file as shown in Figure 12.
- Clicking “download” button B3 in Figure 11 or “download collected amount file” button B1 in Figure 12 will download file to your local machine.



New Guarantee Approval

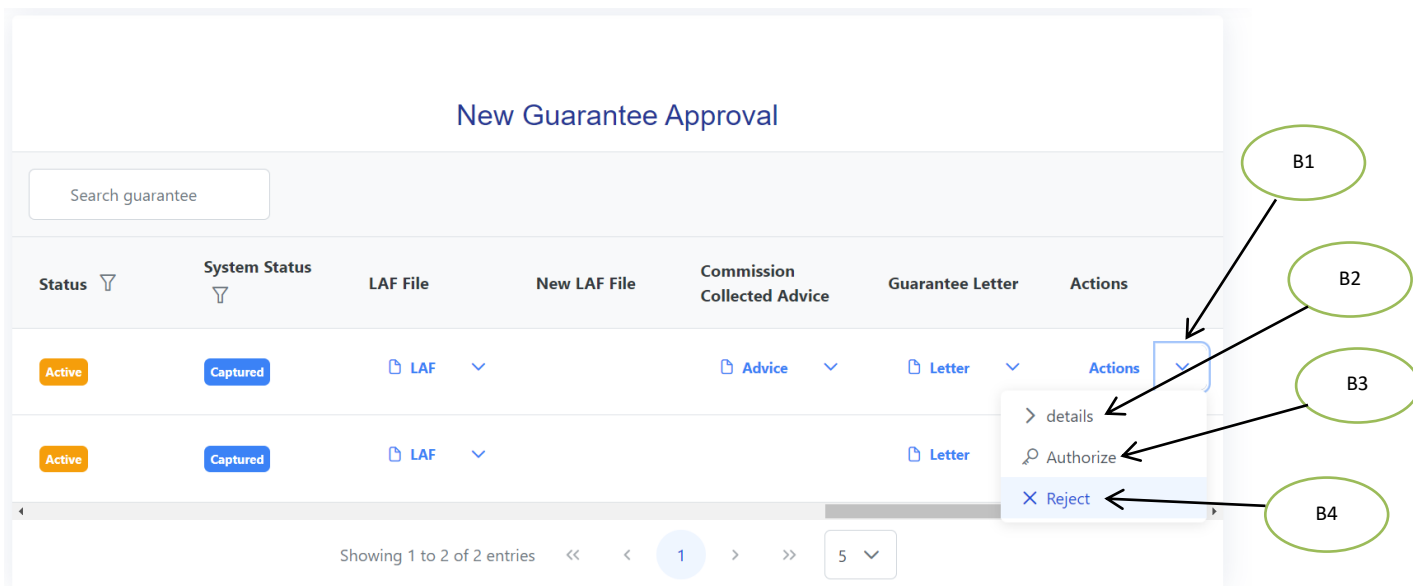
Search guarantee

	Client Id	Client Name	Guarantee Serial Number	Reference Number	Guarantee Type
>	2222222	segment client name	12121	11111	Performance
>	2222222	segment client name	SN 232002	ABBBb22	Performance

Showing 1 to 2 of 2 entries << < 1 > >> 5

S1 points to the pagination controls.

Figure 6: New and Extended Guarantee Approval



New Guarantee Approval

Search guarantee

Status	System Status	LAF File	New LAF File	Commission Collected Advice	Guarantee Letter	Actions
Active	Captured	LAF		Advice	Letter	Actions
Active	Captured	LAF			Letter	

Showing 1 to 2 of 2 entries << < 1 > >> 5

B1 points to the 'Actions' dropdown menu. The dropdown menu contains:

- B2** details
- B3** Authorize
- B4** Reject

Figure 7: New and Extended Guarantee Approval Actions

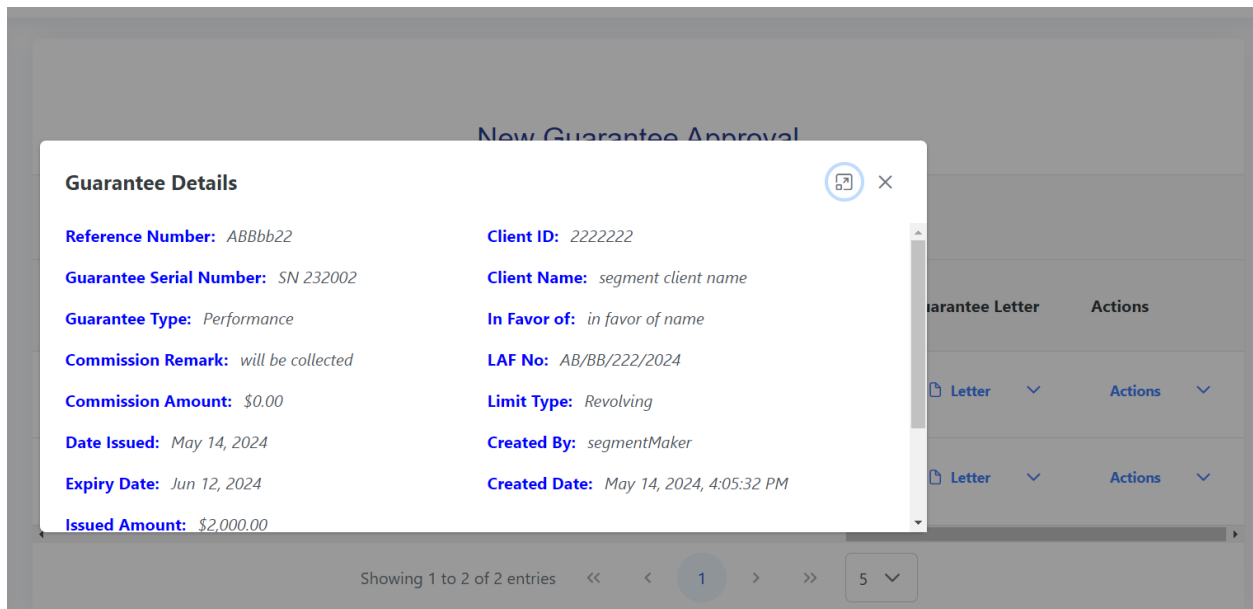


Figure 8: New Guarantee Details

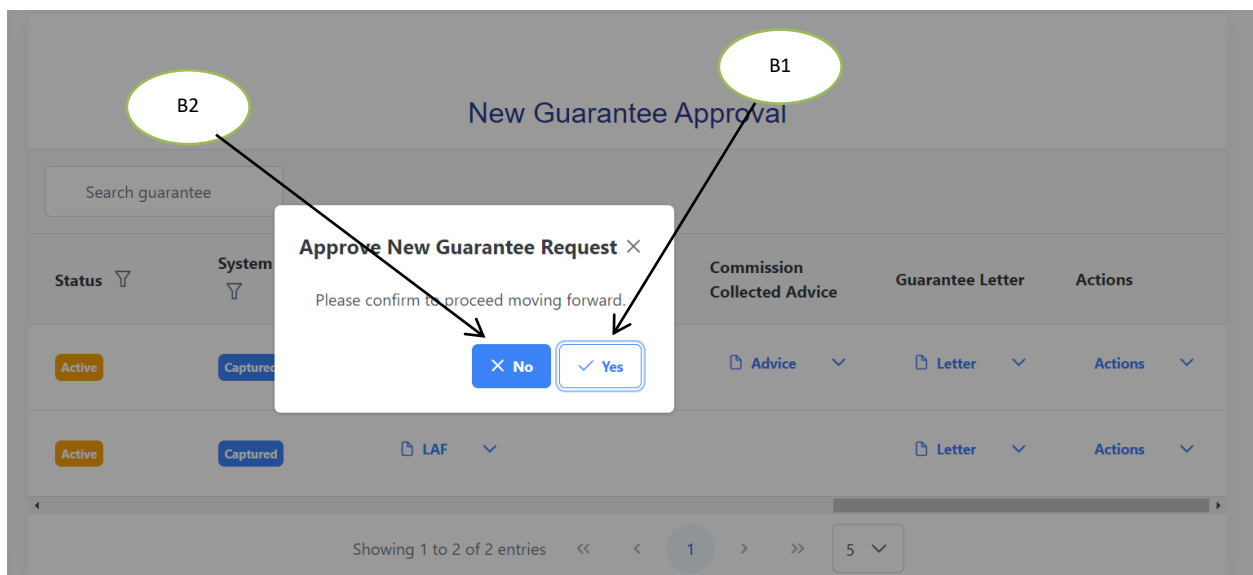


Figure 9: Approve New Guarantee

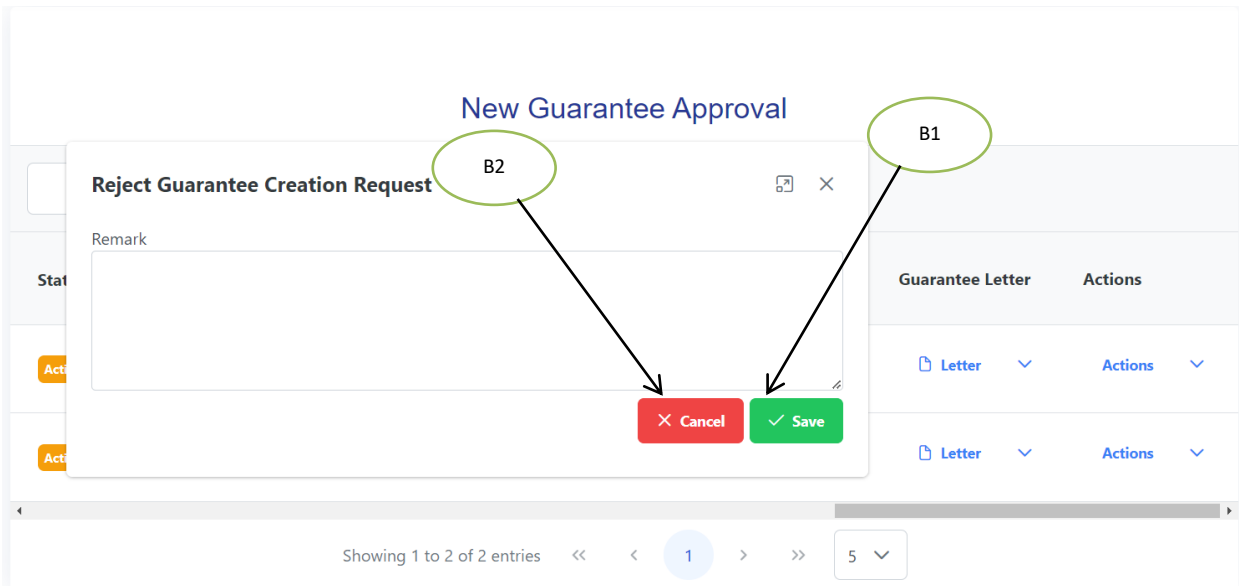


Figure 10: Reject/Return New Guarantee

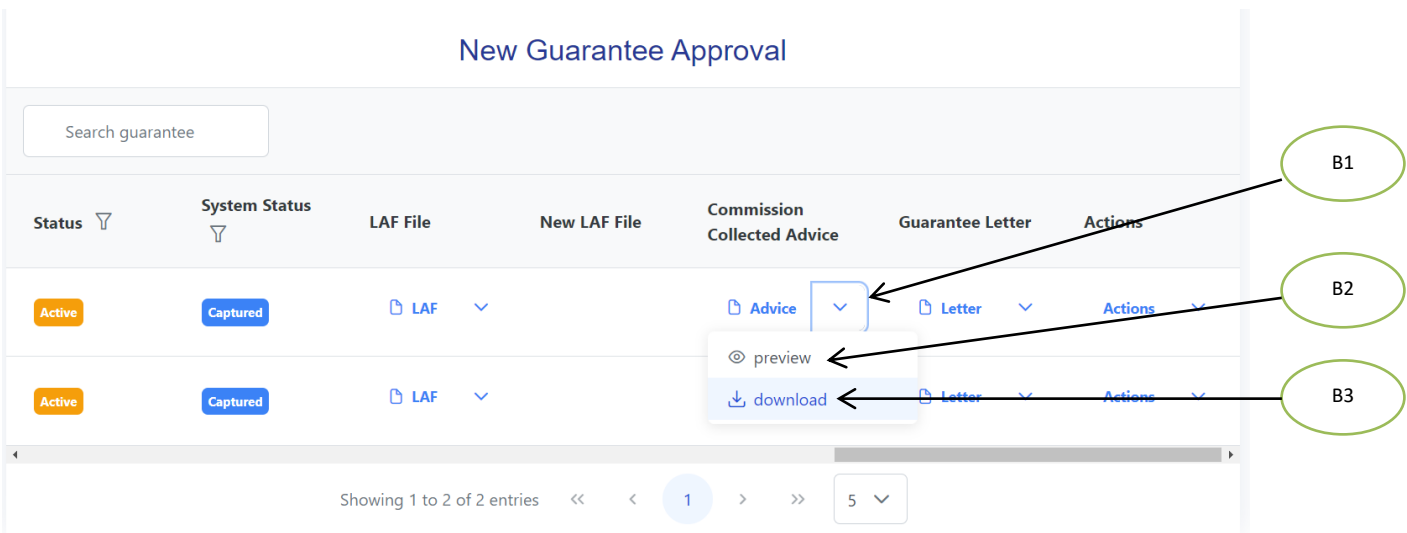


Figure 11: Actions on Files

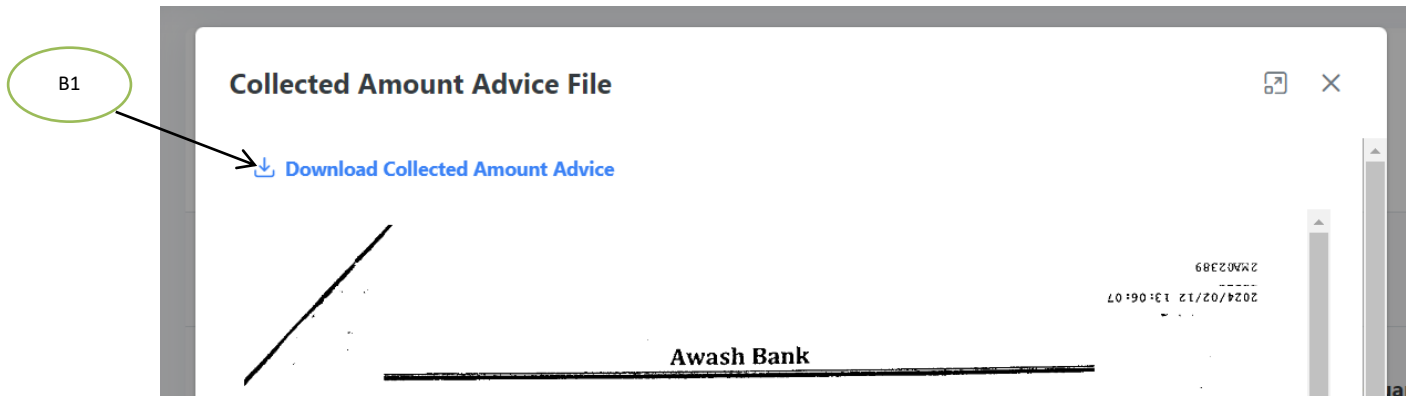


Figure 12: PDF Viewer

5.3 Modified Guarantee Approval

5.3.1 Actions

- Scrolling horizontal scroll S1 in Figure 13, will display details and actions as shown in Figure 14.
- Clicking button B1 in Figure 14, will display buttons B2, B3, and B4 as shown in Figure 14.
- Clicking “details” button B2 in Figure 14 will display details of modified guarantee as shown in Figure 15.
- Clicking the "Authorize" button (B3 in the Figure 14) will display a confirmation dialog as shown in Figure 16. To approve the selected modified guarantee request, click the "Yes" button (B1 in Figure 16). To cancel the action, click the "No" button (also in Figure 16).
- Clicking the "Reject" button (B4 in the Figure 14) will pop up and display a rejection form as shown in Figure 17. To reject/return the selected modified guarantee request, click the "Save" button (B1 in Figure 17) by writing rejection remark. To cancel the action, click the "Cancel" button (also in Figure 17).

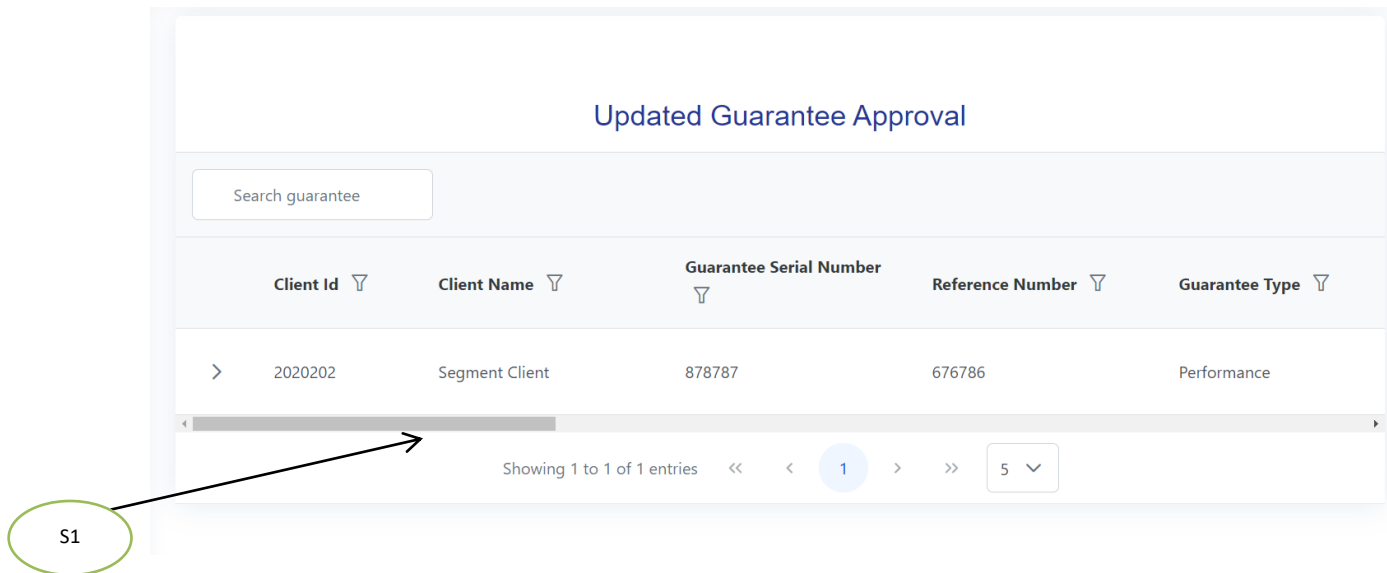


Figure 13: Modified Guarantee Approvals

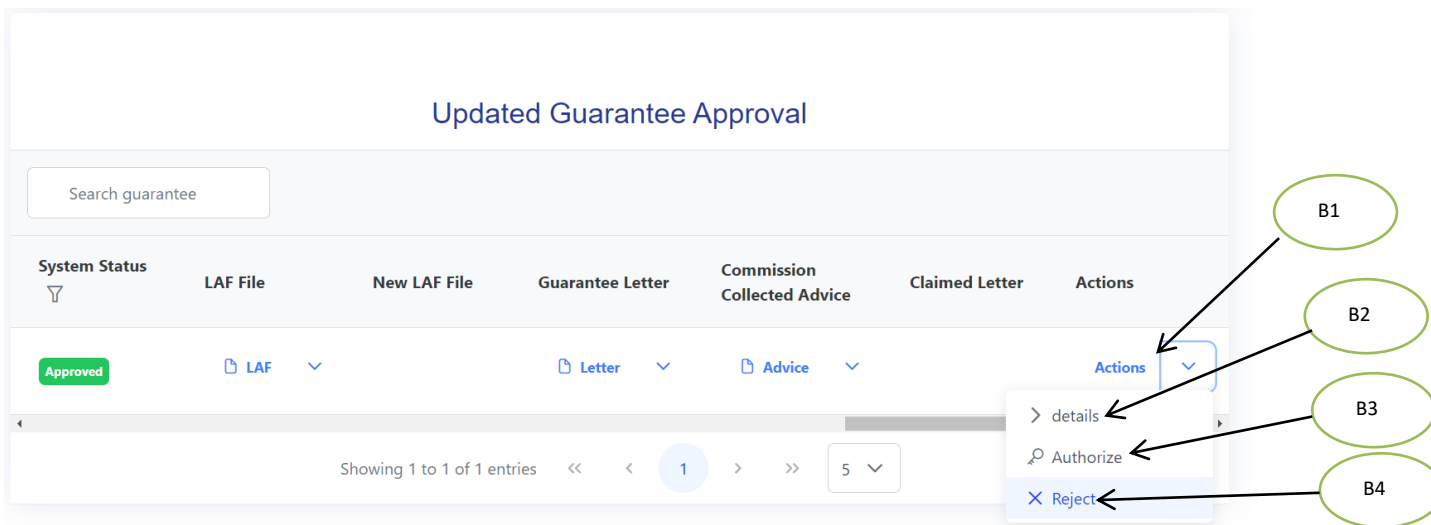


Figure 14: Modified Guarantee Approvals (Actions)

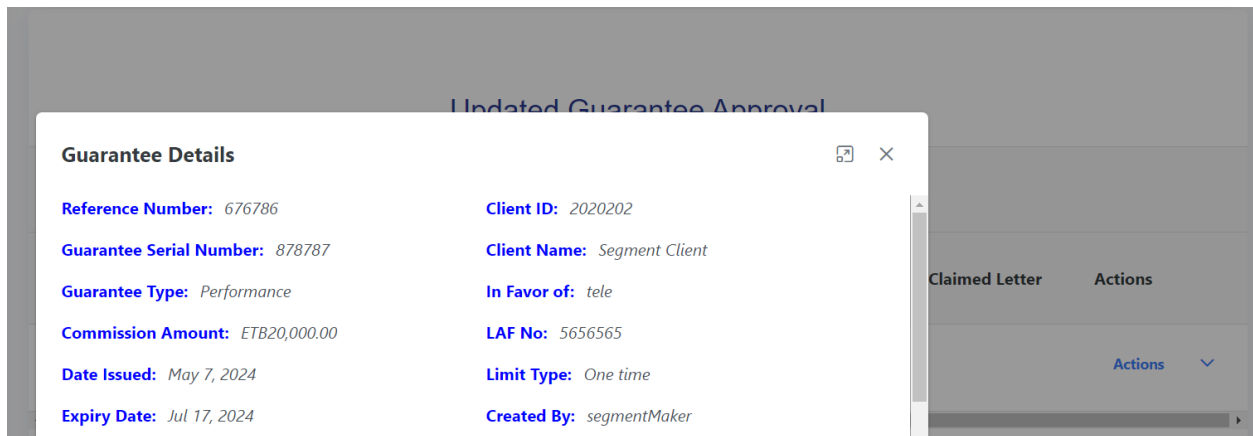


Figure 15: Modified Guarantee Details

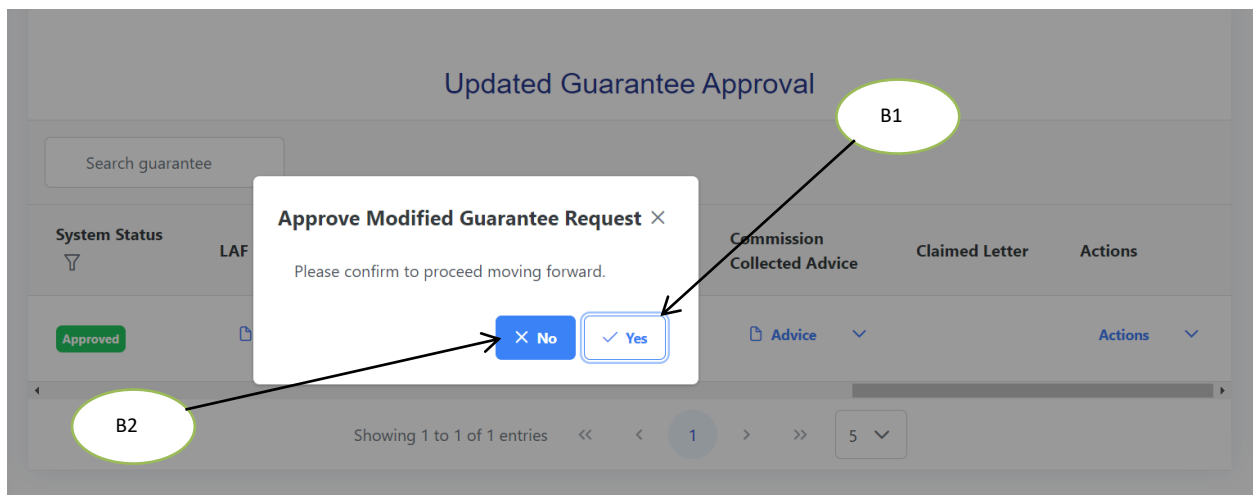


Figure 16: Approve Modified Guarantee

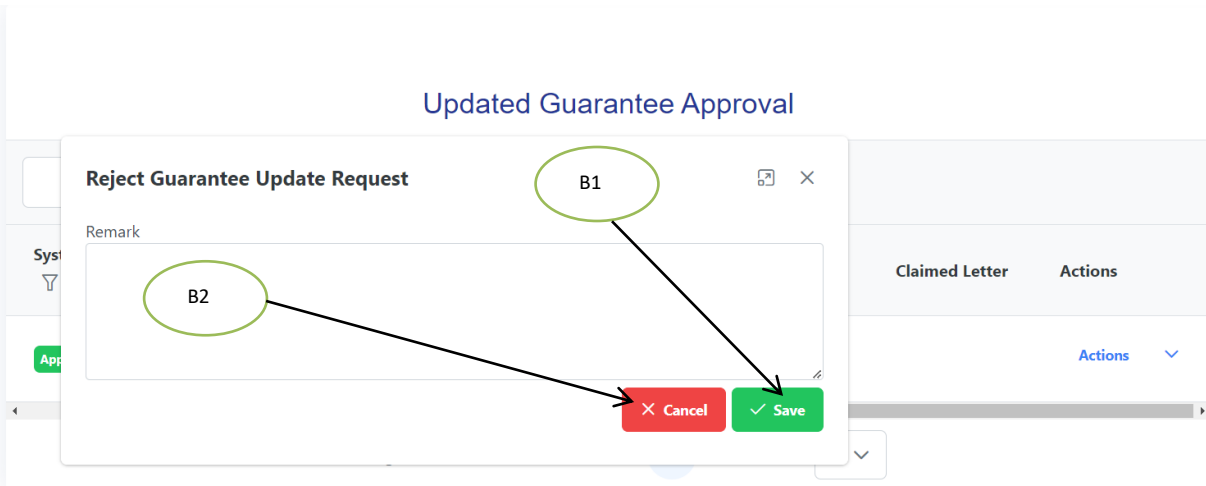


Figure 17: Reject/Return Modified Guarantee

6 Segment Limit Approval Management

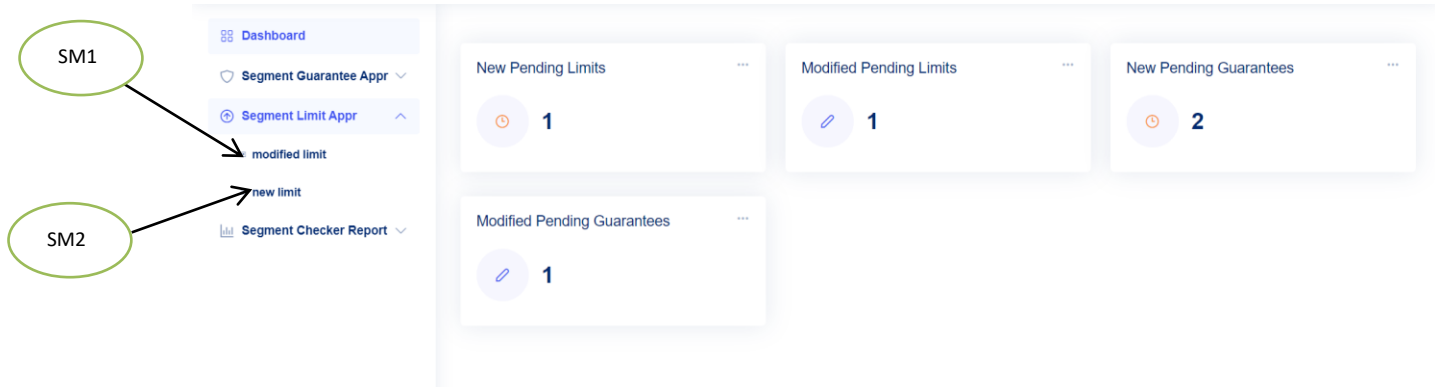


Figure 18: Segment Limit Approval Sub Menus

6.1 Limit Approval Sub-Menus

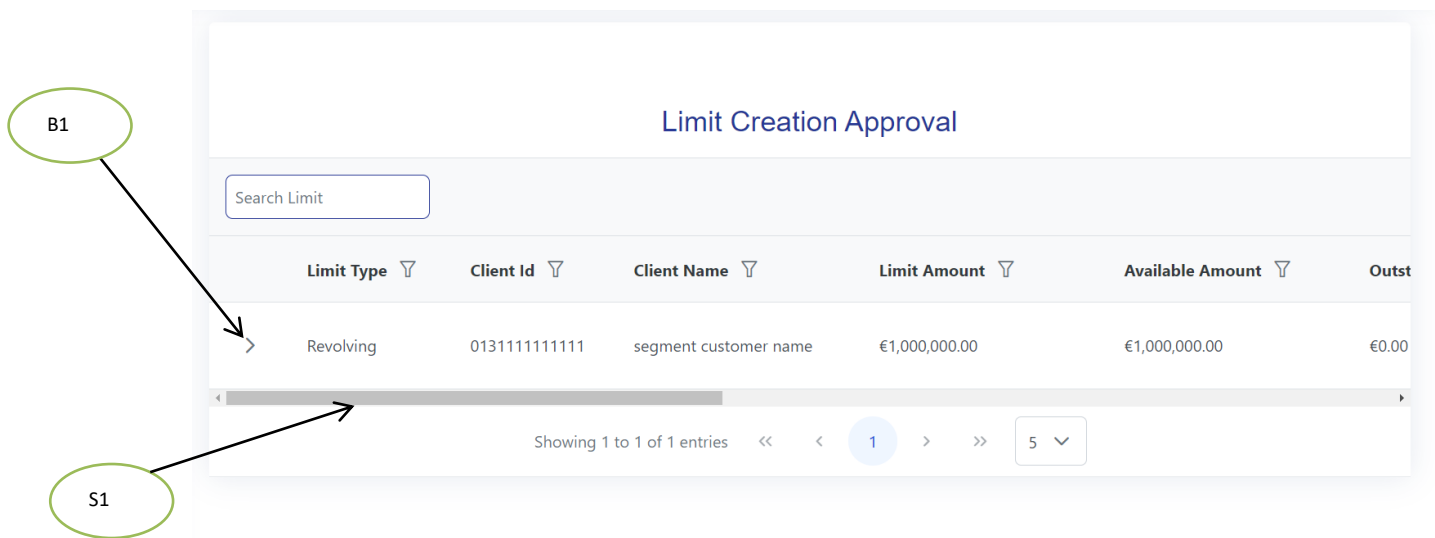
- Clicking Sub-Menu SM1 of M3 (menu in Figure 1) in Figure 18 will display the screen shown in Figure 19.
- Clicking Sub-Menu SM2 of M3 (menu in Figure 1) in Figure 18 will display the screen shown in Figure 24.

6.2 New Limit Approval

6.2.1 Actions

- Scrolling horizontal scroll S1 in Figure 19, will display details and actions as shown in Figure 22.

- Clicking “>” button B1 in Figure 19 will display details of selected new limit issued as shown in Figure 20. If you click “>” button B2 in Figure 20 it will display more details of the selected row.
- Clicking “View” link B1 in Figure 20, will display collateral details of new issued limit as shown in Figure 21.
- Clicking the "Authorize" button (B1 in the Figure 22) will display a confirmation dialog as shown in Figure 23. To approve the selected new limit issued request, click the "Yes" button (B1 in Figure 23). To cancel the action, click the "No" button (also in Figure 23).
- Clicking button B2 in Figure 22 will display button B3 in Figure 22.
- Clicking the "Return" button (B3 in the Figure 22) will pop up and display a rejection form as shown in Figure 24. To reject/return the selected new limit request, click the "Save" button (B1 in Figure 24) by writing rejection remark. To cancel the action, click the "Cancel" button (also in Figure 24).



Limit Creation Approval						
Search Limit						
Limit Type ▾	Client Id ▾	Client Name ▾	Limit Amount ▾	Available Amount ▾	Outst	
> Revolving	0131111111111	segment customer name	€1,000,000.00	€1,000,000.00	€0.00	

Showing 1 to 1 of 1 entries << < 1 > >> 5 ▾

Figure 19: New Limit Approval

Limit Creation Approval					
<div>Search Limit</div>					
Limit Type	Client Id	Client Name	Limit Amount	Available Amount	Outst
> Revolving	0131111111111	segment customer name	€1,000,000.00	€1,000,000.00	€0.00
<div> <div>B2</div> <div>></div> </div>		System Status	LAF Number	Collateral Details	LAF Approver
<div> <div>Captured</div> </div>		11111	View	Chief Credit Operat	
Created By	Created Date	Modified By	Modified Date	Created A	
	May 21, 2024, 3:00:34 PM				

Figure 20: New Limit Details

Limit Creation Approval

Collateral Details

Collateral Type:

Buildings completed

Collateral Value:

€1,000,000.00

Collateral Number:

AA1212

Available Amount

Outst

€1,000,000.00

€0.00

LAF Approver

Chief Credit Operatio

Created By

Created Date

Modified By

Modified Date

Created App

Figure 21: Collateral Details

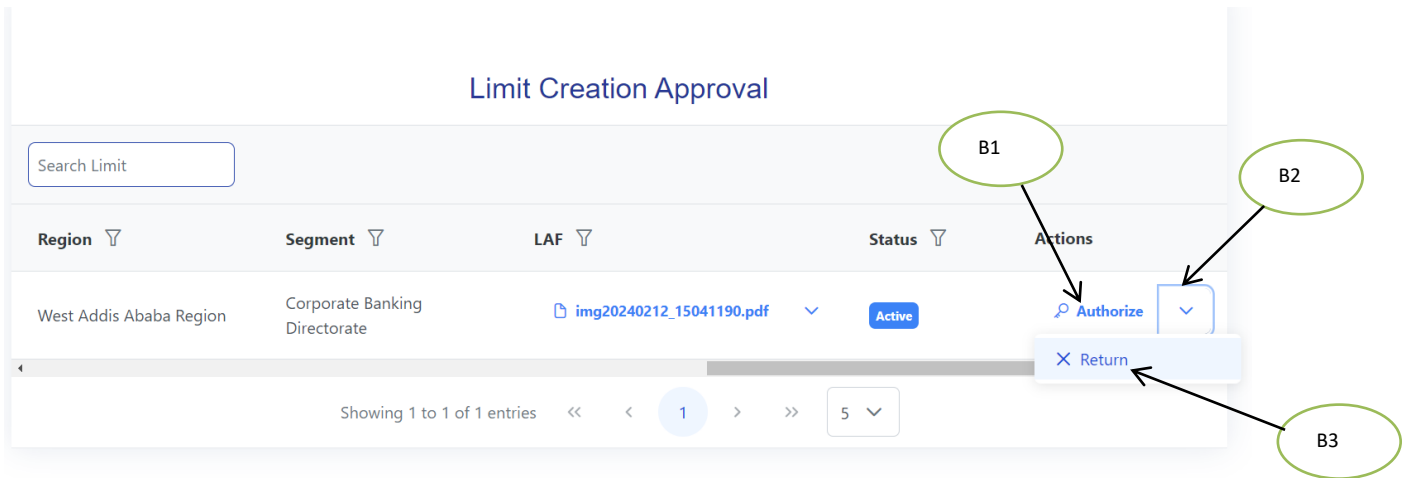


Figure 22: New Limit Approval Actions

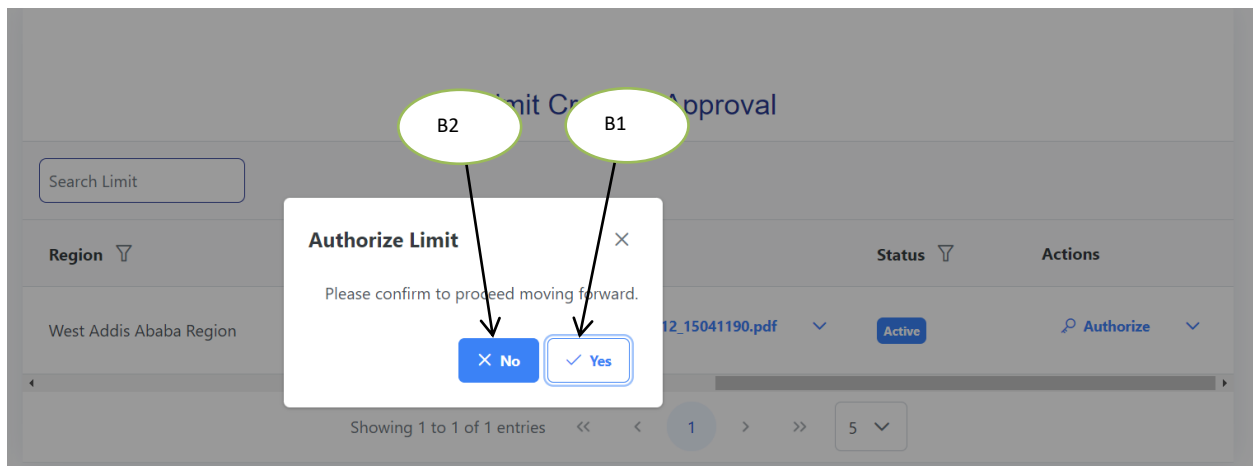


Figure 23: Authorize the new Limit

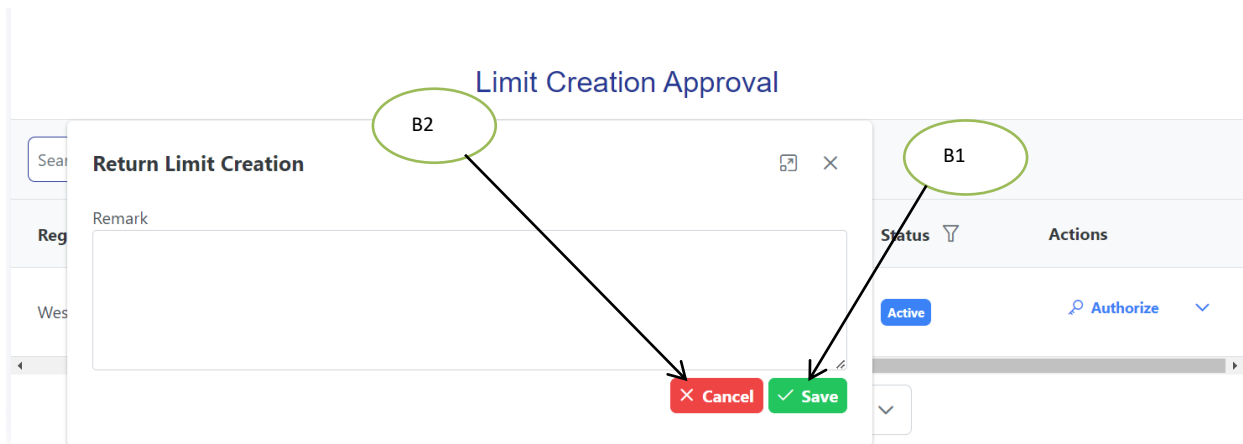


Figure 24: Reject/Return Limit

6.3 Modified Limit Approval

NB: Actions on the modified is same as New Limit Approval but, check the modified details before you get approve the modified limit.

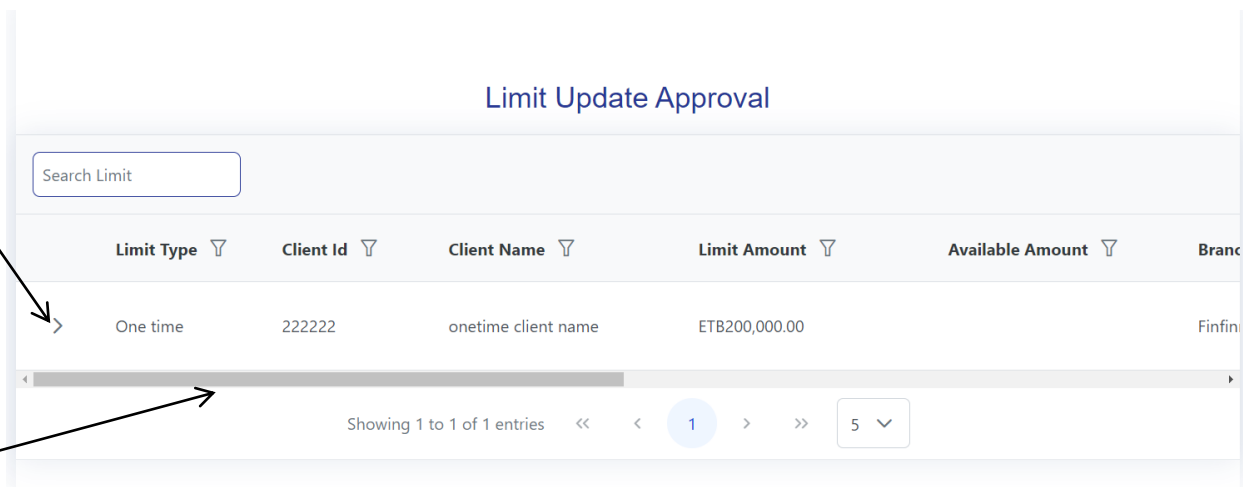


Figure 24: Modified Limit Approval

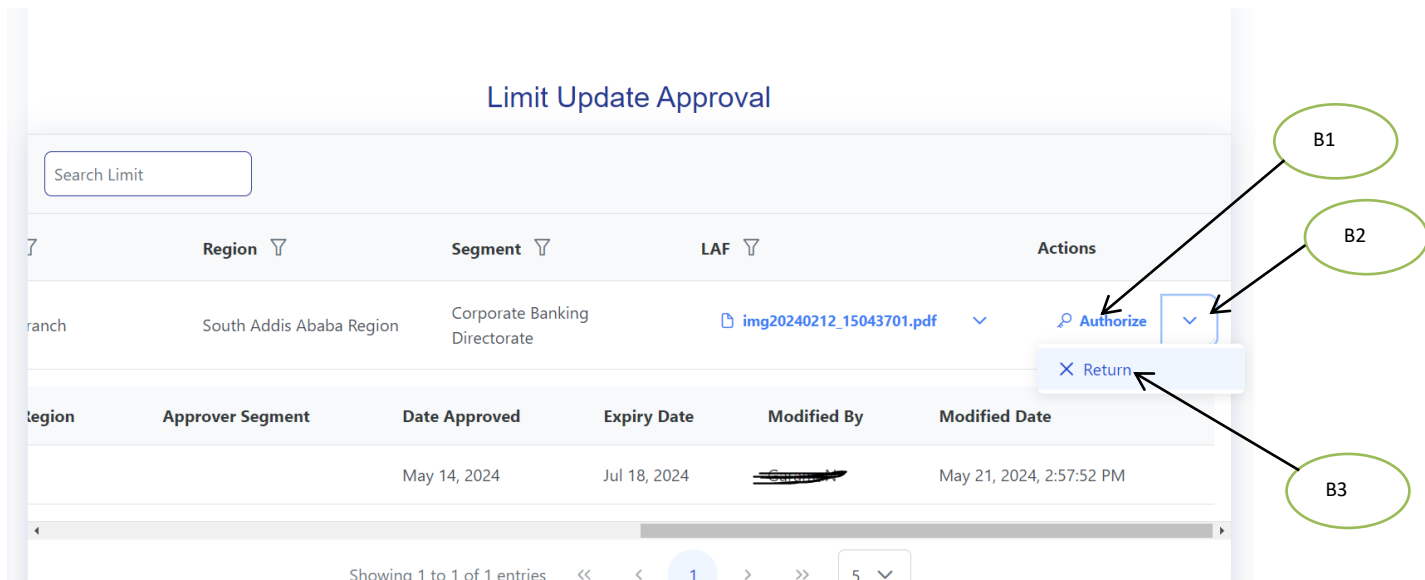


Figure 25: Modified Limit Details

7 Segment Checker's Report

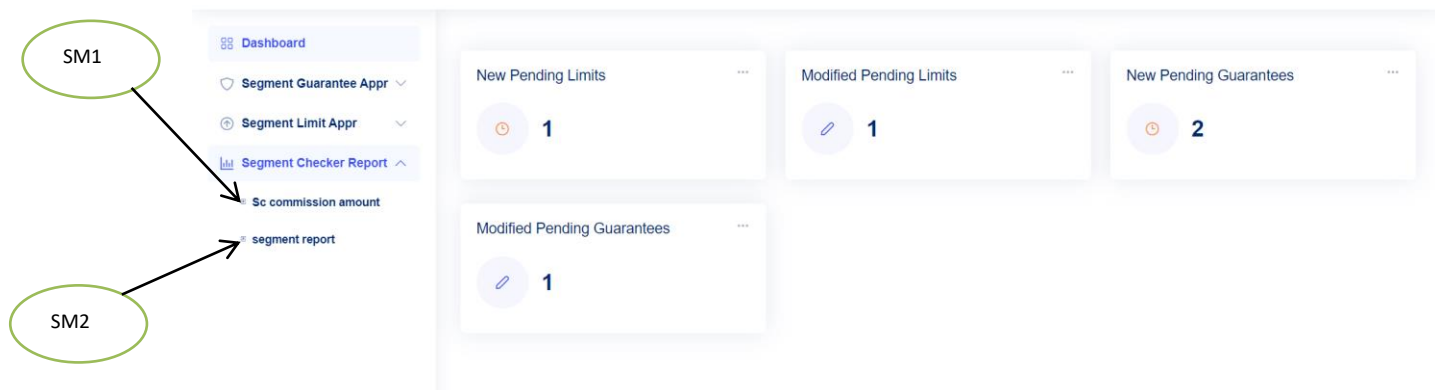


Figure 26: Sub Menus of Segment Checker Report Menu

7.1 Sub Menu

- Clicking Sub-Menu SM1 of M4 (menu in Figure 1) in Figure 26 will display the screen shown in Figure 27.
- Clicking Sub-Menu SM2 of M4 (menu in Figure 1) in Figure 26 will display the screen shown in Figure 30.

7.2 Segment Checker's Guarantee Report

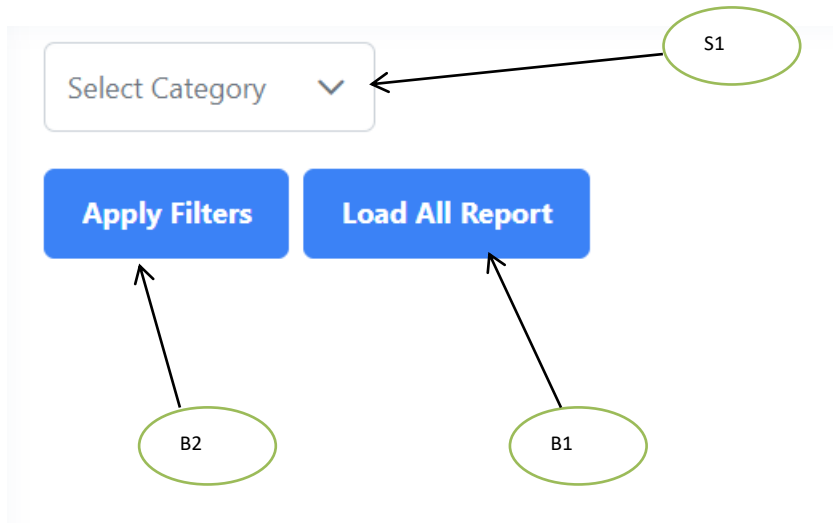


Figure 27: Segment Checker's Guarantee Report

7.2.1 Actions

- Clicking button B1 in Figure 27 will display all guarantee data of the unit from which the user is logged in as shown in Figure 28
- Selecting one or many category by selecting S1 in Figure 27 and clicking button B2 as in Figure 27 will display filters information as header and show you report as shown in Figure 29
- Clicking button B1 in Figure 28, 29 will download the report in excel format
- Clicking button B2 in Figure 28, 29 will download the report in pdf format

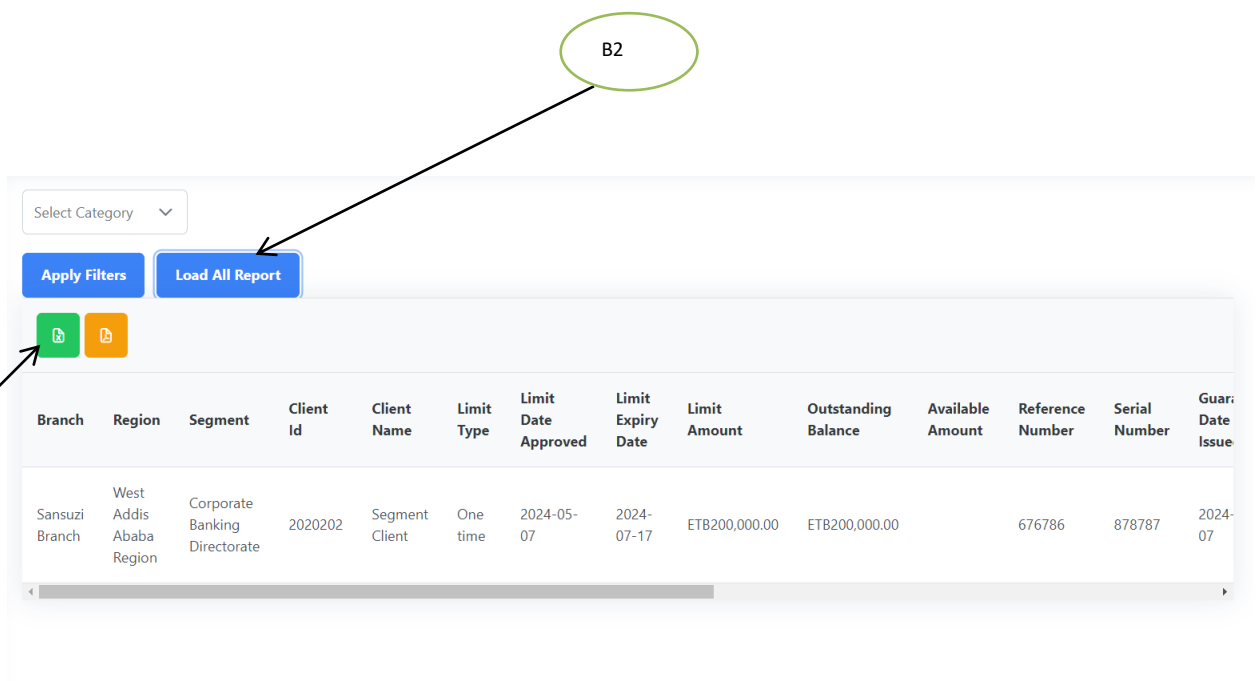


Figure 28: Segment Checker's All Guarantee Report

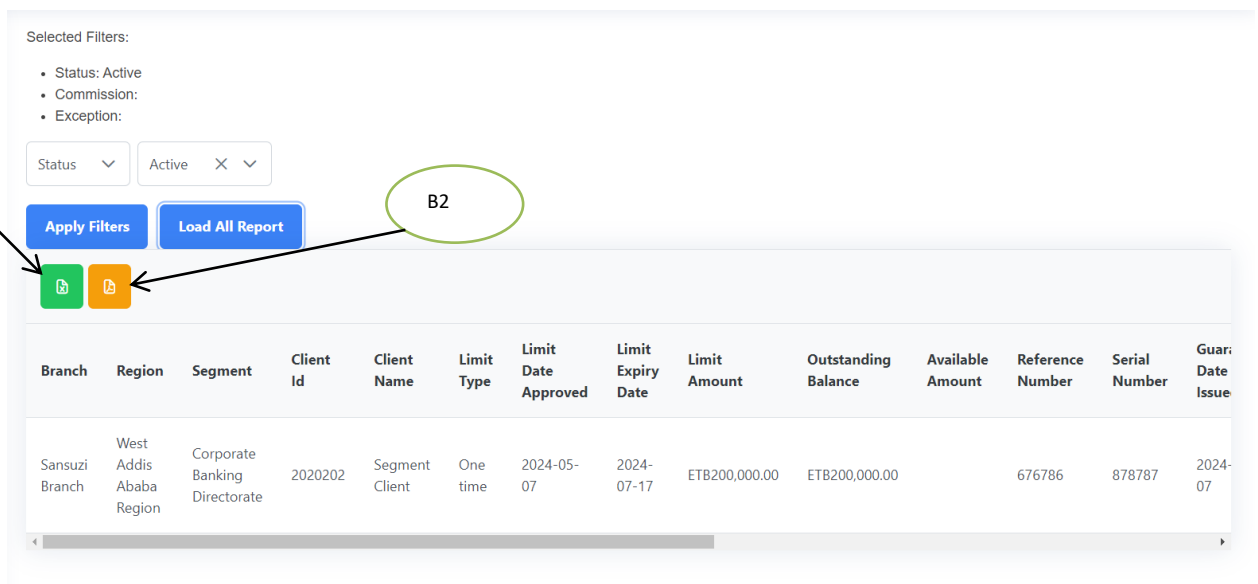


Figure 29: Segment Checker's Guarantee Report by Filters

7.3 Commission Report

Date Range(optional)

Load Report

Figure 30: Segment Checker's Commission Report

7.3.1 Actions

- Clicking button B2 in Figure 30 will list total commission collected at that segment by each currency as shown in Figure 31
- Clicking button B1 in Figure 30 will allow you to select date range and click button B2 in Figure 30 will list total commission collected in that selected date range by each currency code.

NB: You can export the data to excel and pdf file.

Date Range(optional)

Load Report

PDF Excel

Currency Code	Total Commission Collected
ETB	20000

Figure 31: Segment Checker's Total Commission Report by Each Currency