Branch Checker User manual – Limit and Guarantee Approval

Guarantee Management System

Release V1.0.0

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Introduction

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

Audience

This manual is intended for the following User Roles:

Role	Function
Branch Checker	New limit and guarantee approval, modified limit and guarantee approval

User

- After you have successfully logged into Guarantee Management System as a branch checker, the screen on (Figure 1) will be displayed.
- D1 shows logged in user role.
- D2 shows logged in user branch.
- D3 shows logged in user name.
- Click on the drop down arrow next to user name (B1) (Figure 1) which will drop a modal as shown in Figure 2.
- Click on "need help?" button (B1) (Figure 2) to get this user manual.
- Click on "sign out" button (B2) (Figure 2) to log out of this system.
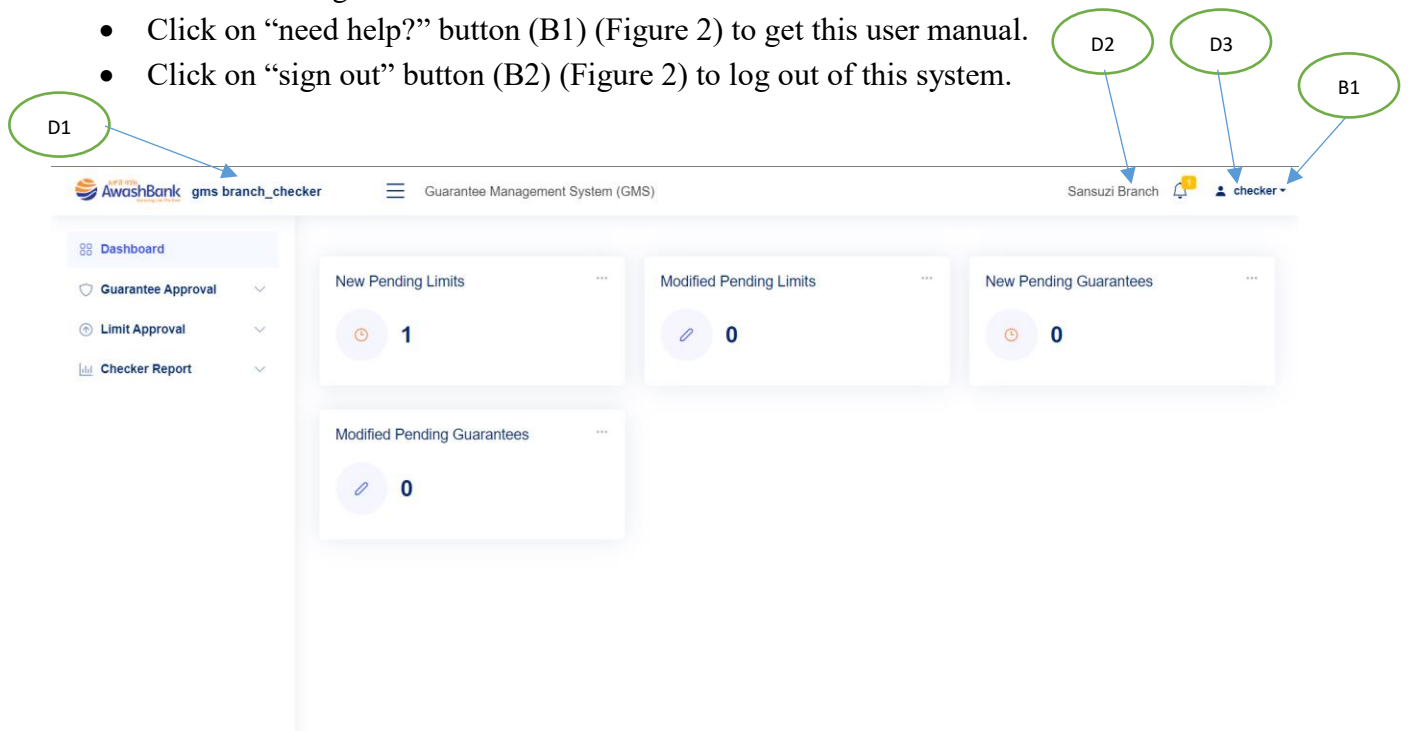

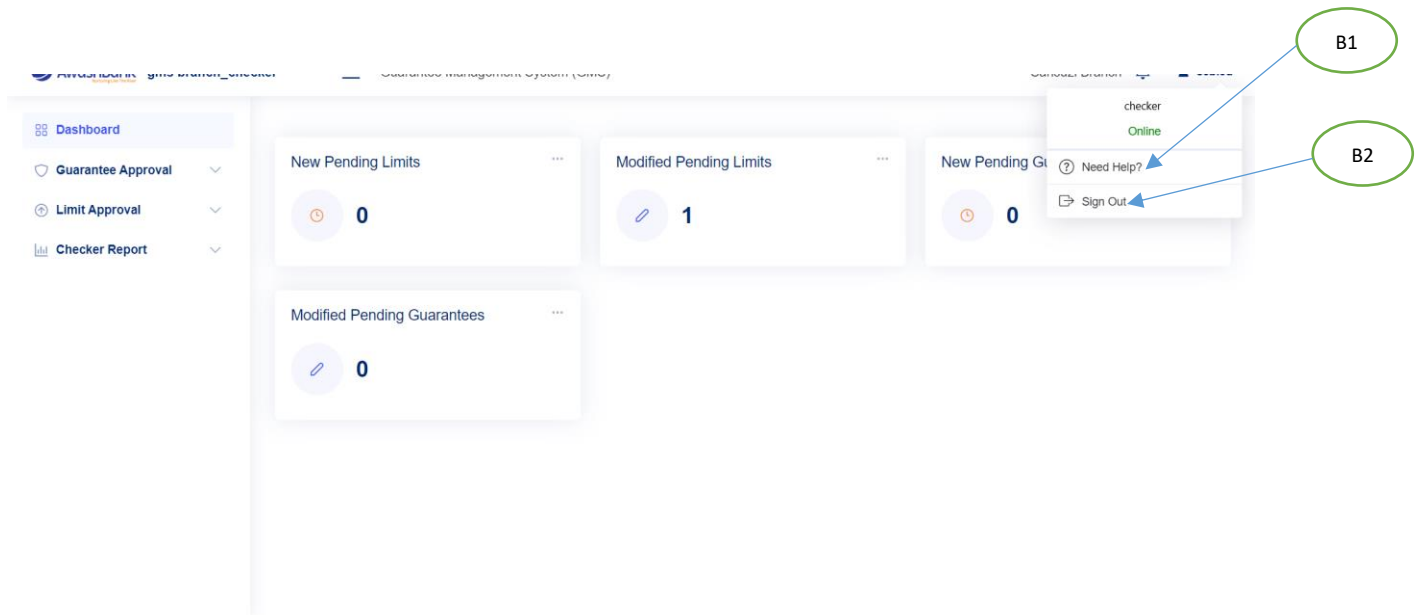*Figure 1: page after log in*

Figure 2: user actions

Dashboard

The dashboard consists of multiple data about limits and guarantee.

- D1 shows the number of new pending limits.
- D2 shows the number of modified pending limits.
- D3 shows the number of new pending guarantees.
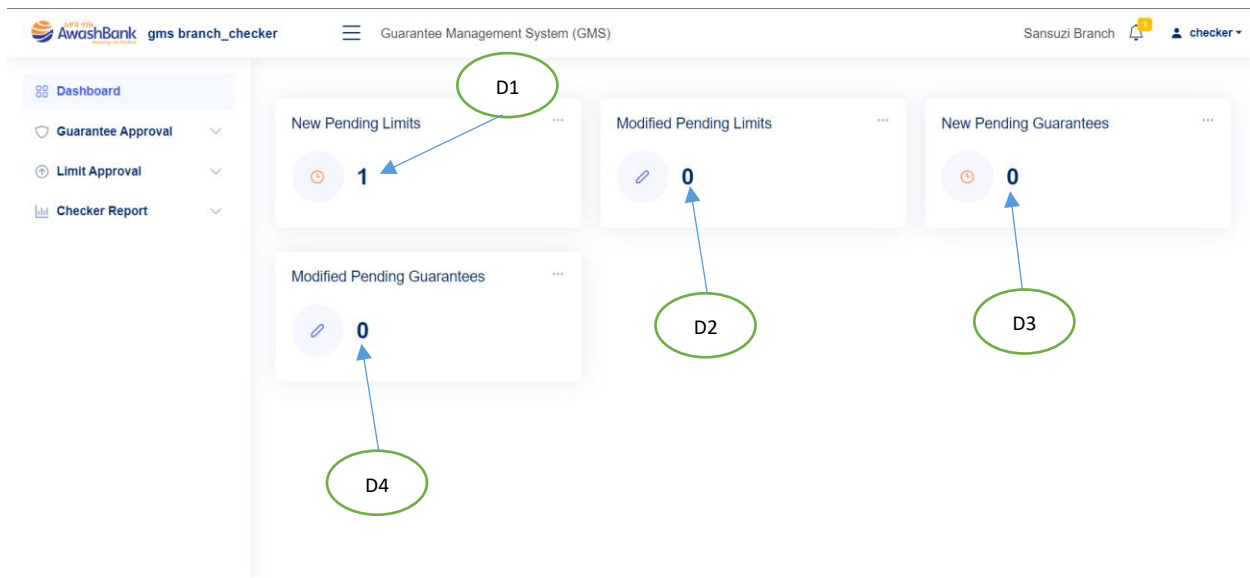- D4 shows the number of modified pending guarantees.

Figure 3: dashboard

New Pending Limit

New Limit Detail:

- To approve or return a new pending limit, click on the sub menu "new limit" (B1) or click on the three dots in the "new pending limits" box (B2) which will drop down a modal that has "approval" (B3) as more info as shown in Figure 4.
- After that you will be directed to a page as shown in Figure 5.
- To view details of limit, click on B1 as shown in Figure 5.
- To view more details of limit, click on B1 as shown in Figure 6.
- To view collateral details, click on "view" (B2) as shown in Figure 6 which will open up a modal as shown in Figure 7.
- After scrolling the table to the right you can see other details. To preview or download a file click on B1 as shown in Figure 8.
- Click on "preview" (B2) to preview the file and "download" (B3) to download the file as shown in Figure 8.
- If you clicked on preview a modal will pop up that shows preview of the file as shown in Figure 9.
- Click on B1 (Figure 9) to download file after previewing.

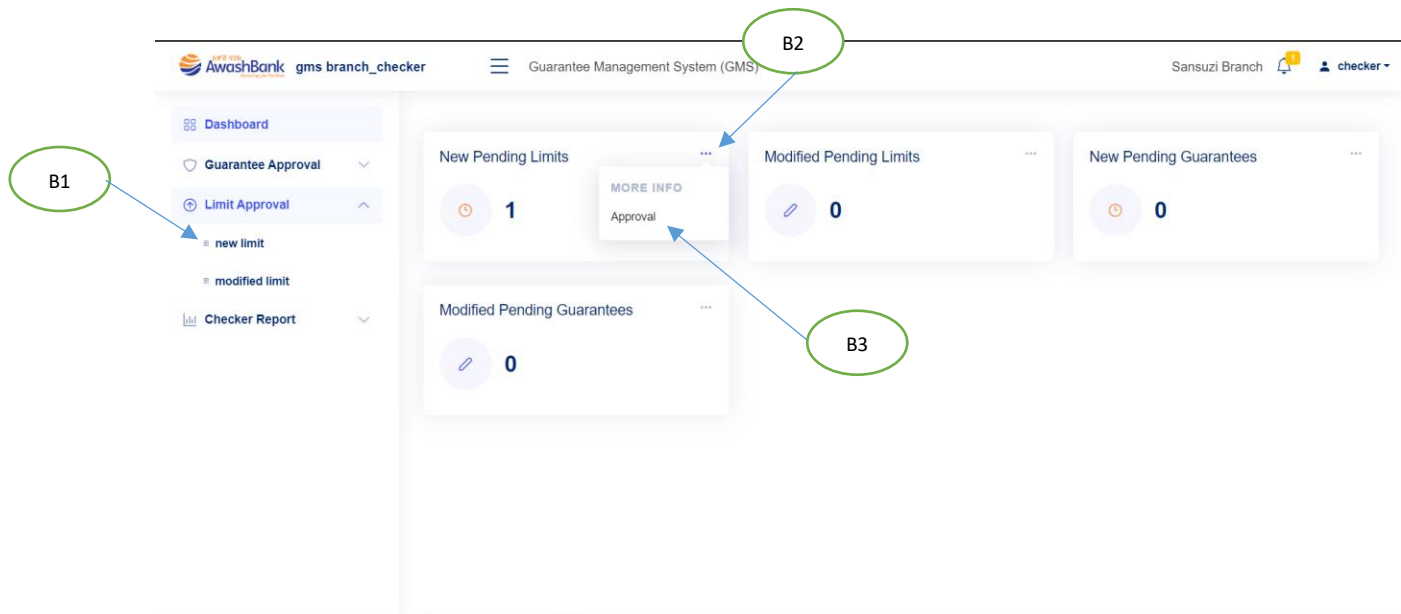**NB:** preview and download works the same for all files that are captured by the system.
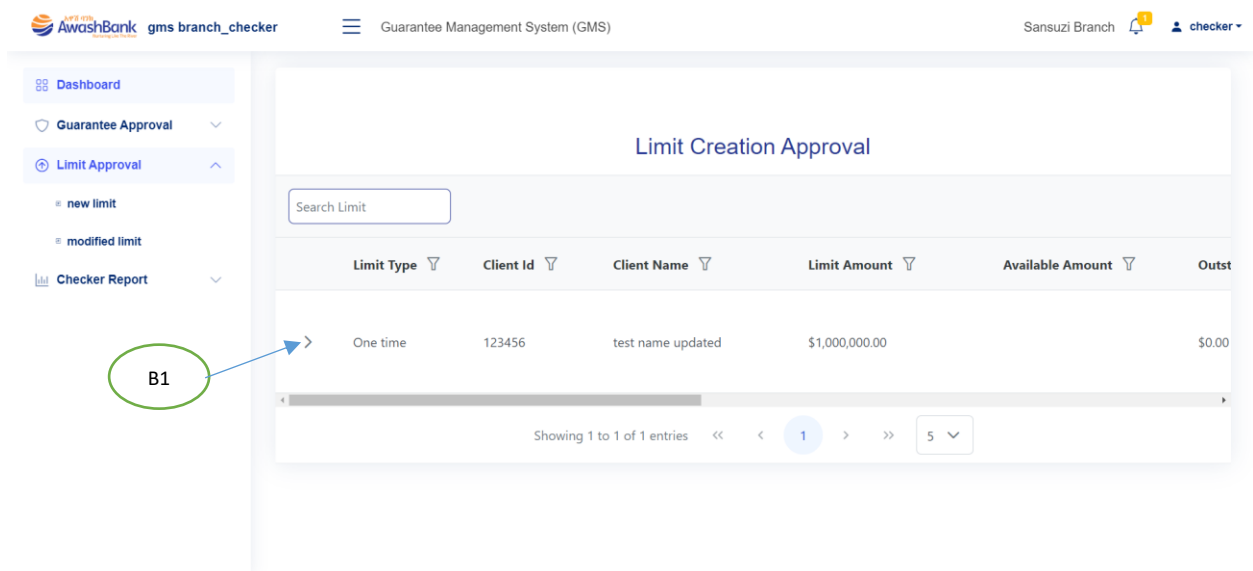
Figure 4: limit approval sub-menu

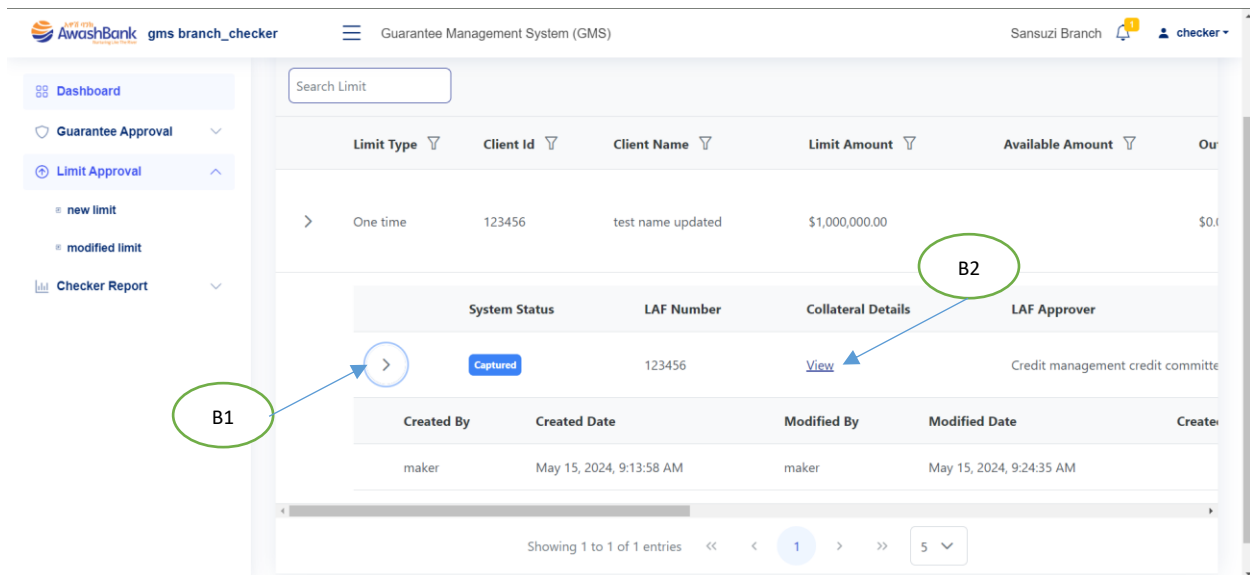
Figure 5: limit creation approval

Figure 6: limit details
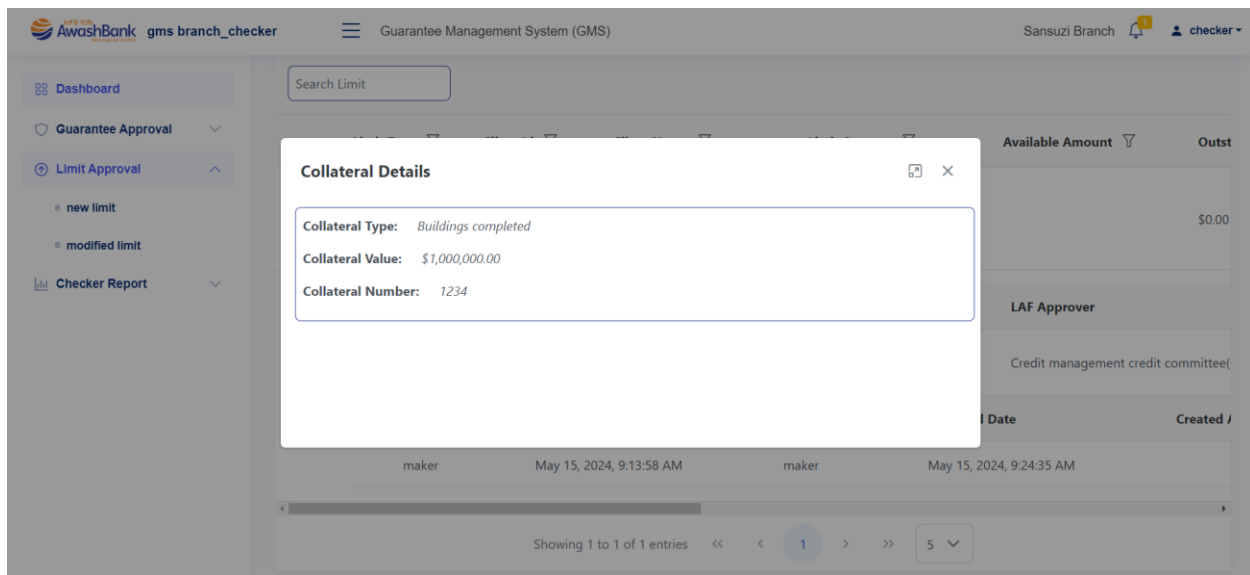
Figure 7: collateral details

Figure 8: LAF file preview, download
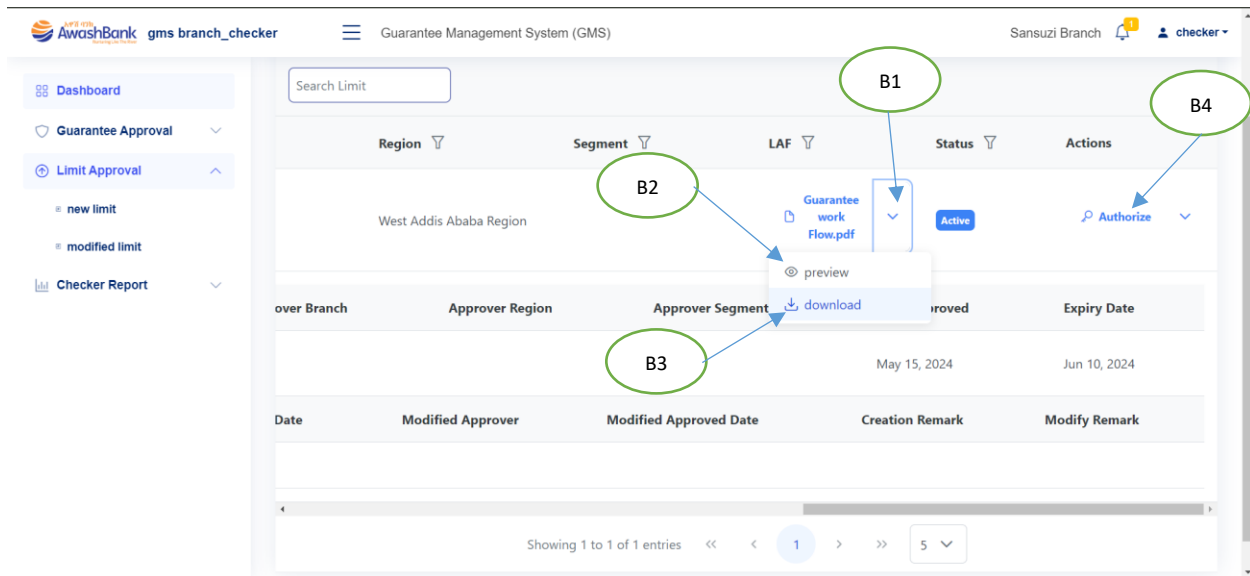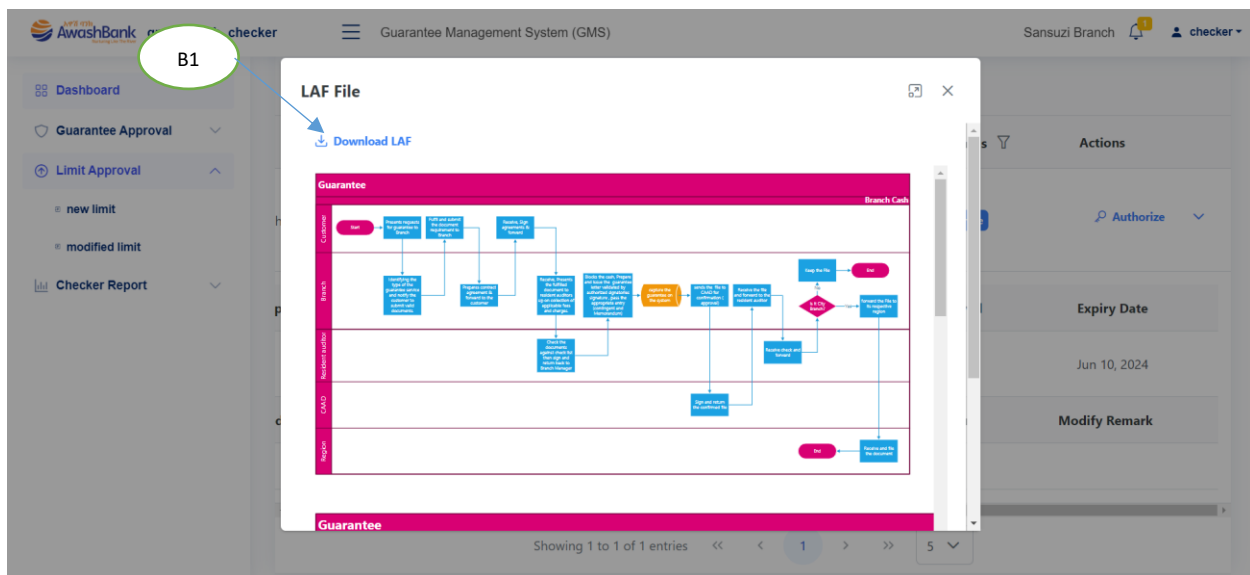

Figure 9: file preview

New Limit Approval:

- To authorize a limit, click on "authorize" button (B4) as shown in Figure 8.
- A confirmation dialogue will pop up as shown in Figure 10.
- Click on "Yes" button (B1) to confirm and "No" button (B2) to cancel request as shown in Figure 10.
- When successful, you will be shown a success message and limit will be removed from the table.

Figure 10: new limit authorize confirmation

New Limit Return:

- To return a limit, click on the drop down arrow (B1), which will pop up "return" button (B2) as shown in Figure 11.
- A modal will pop up that requires you to input a remark (reason for rejection) as shown in Figure 12.
- Click on the "save" button (B1) to submit or "cancel" button (B2) to cancel the return request as shown in Figure 12.
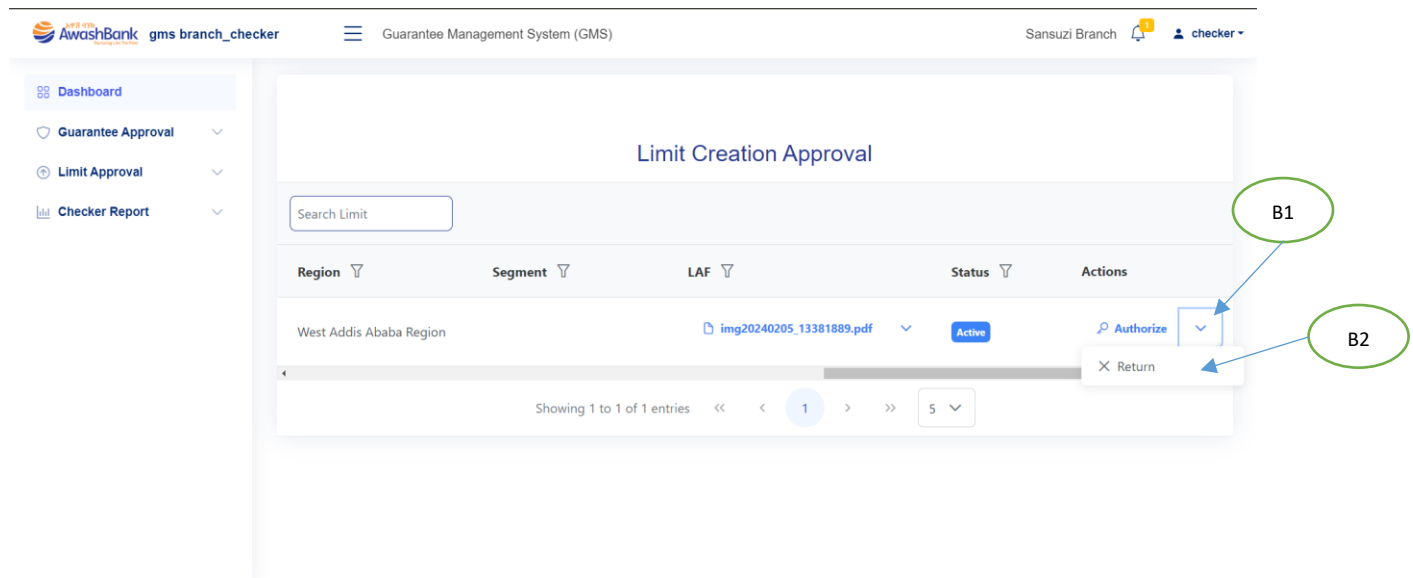
Figure 11: new limit return

Figure 12: limit creation return remark

Modified Pending Limit

Modified Limit:

- To approve or return a modified pending limit, click on the sub menu "modified limit" (B1) or click on the three dots in the "modified pending limits" box (B2) which will drop down a modal that has "approval" (B3) as more info as shown in Figure 13.
- After that you will be directed to a page as shown in Figure 14.
- To authorize a limit, click on "authorize" button (B1) as shown in Figure 15.

- A confirmation dialogue will pop up as shown in Figure 16.
- Click on "Yes" button (B1) to confirm and "No" button (B2) to cancel request as shown in Figure 16.
- When successful, you will be shown a success message and limit will be removed from the table.
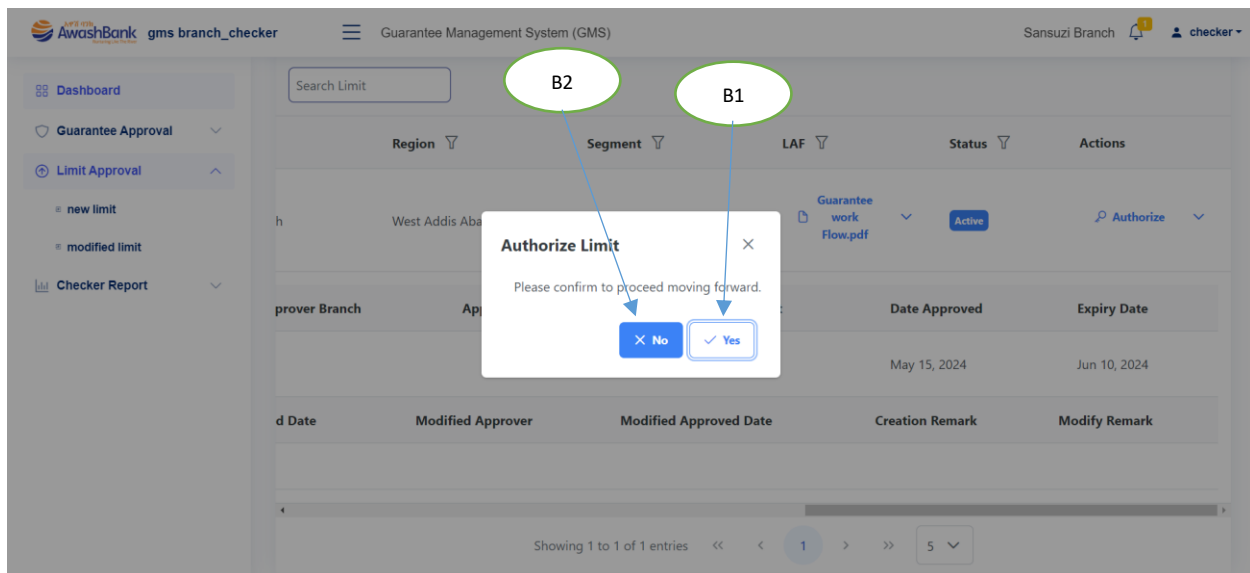- To return a limit, click on the drop down arrow (B2), which will pop up "return" button (B3) as shown in Figure 15.
- A modal will pop up that requires you to input a remark (reason for rejection) as shown in Figure 17.
- Click on the "save" button (B1) to submit or "cancel" button (B2) to cancel the return request as shown in Figure 17.
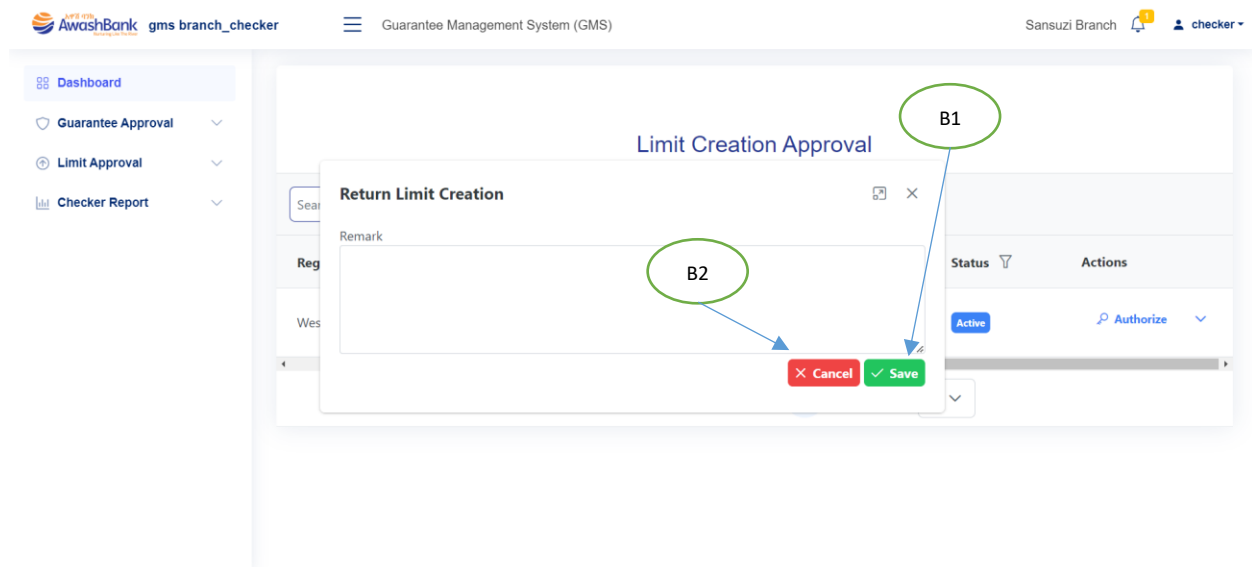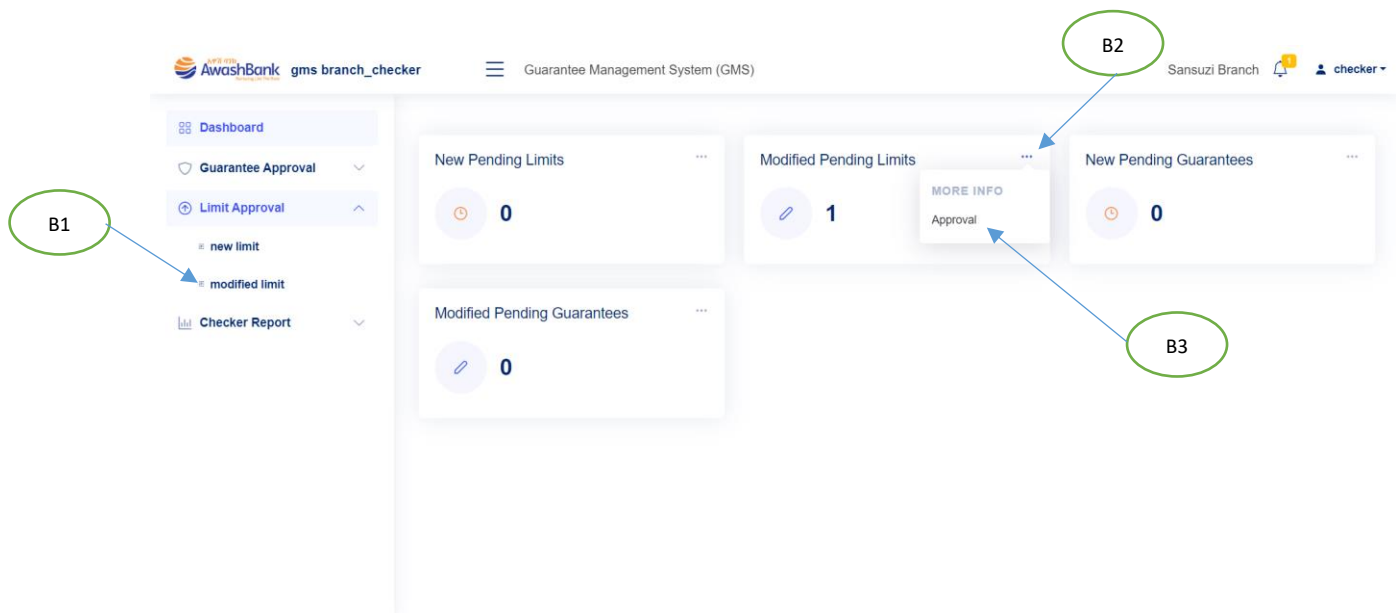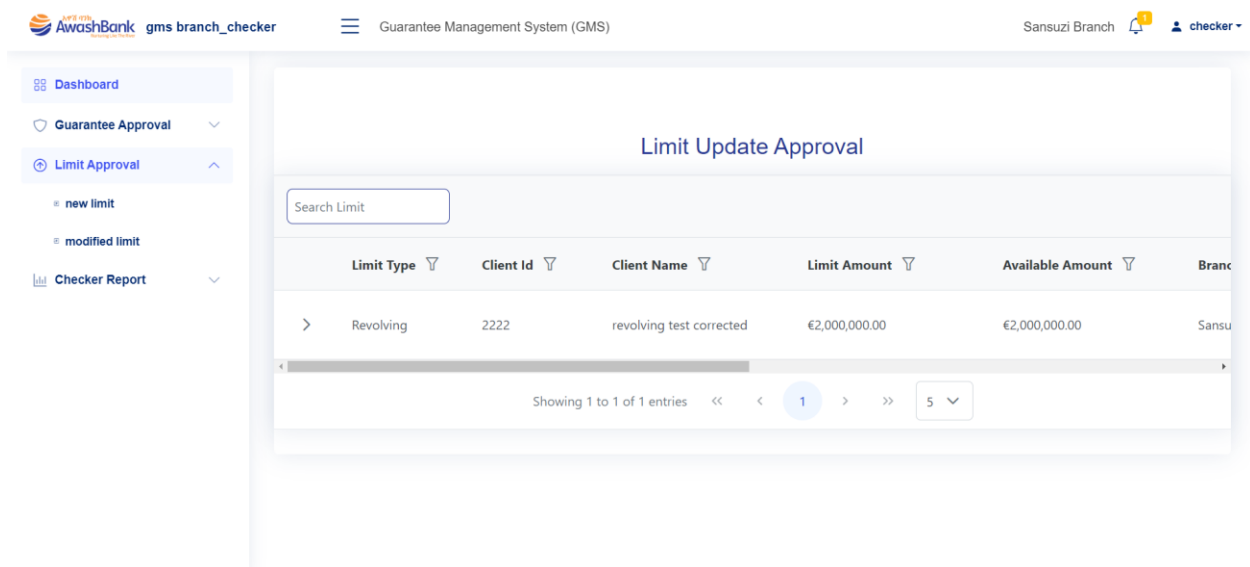

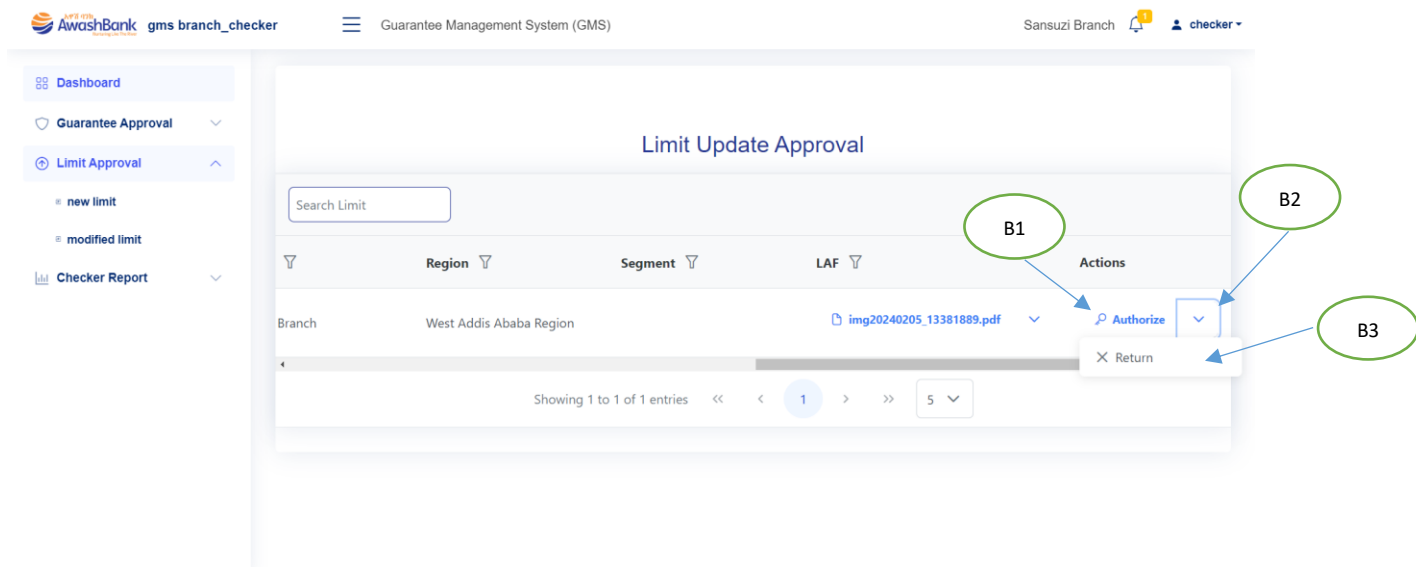*Figure 13: modified limit sub-menu*

Figure 14: modified limit approval

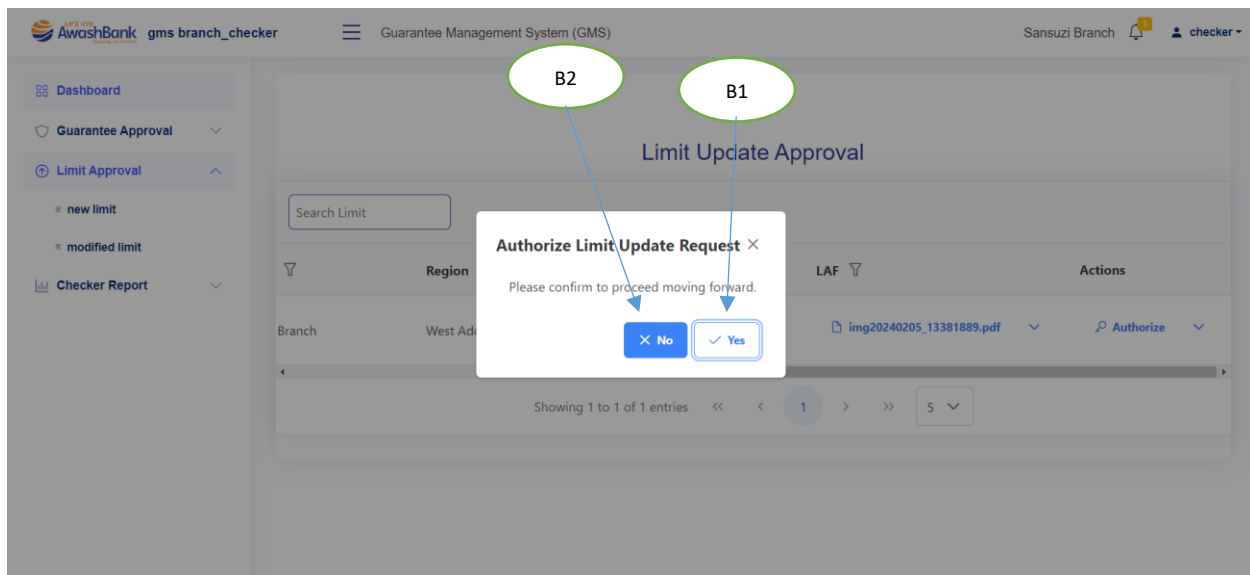

Figure 15: authorize modified limit

Figure 16: authorize modified limit confirmation

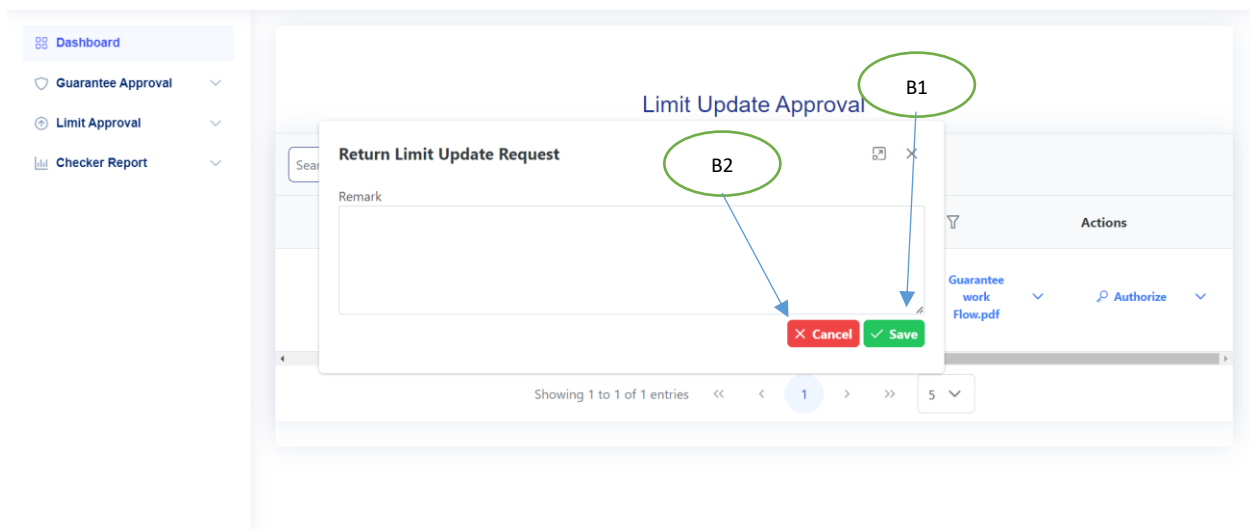*Figure 17: modified limit return remark*

New Pending Guarantee

New Guarantee:

- To approve or return a new pending guarantee, click on the sub menu "new guarantee" (B1) or click on the three dots in the "new pending guarantees" box (B2) which will drop down a modal that has "approval" (B3) as more info as shown in Figure 18.
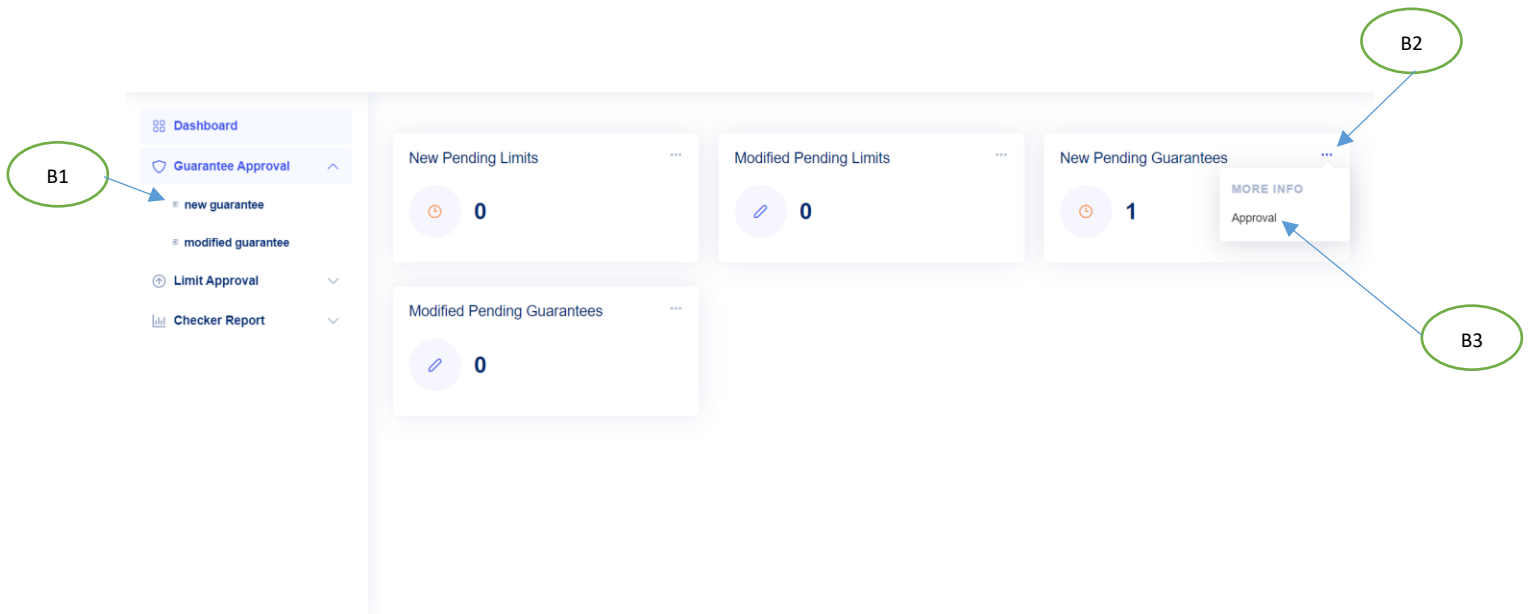- After that you will be directed to a page as shown in Figure 19.
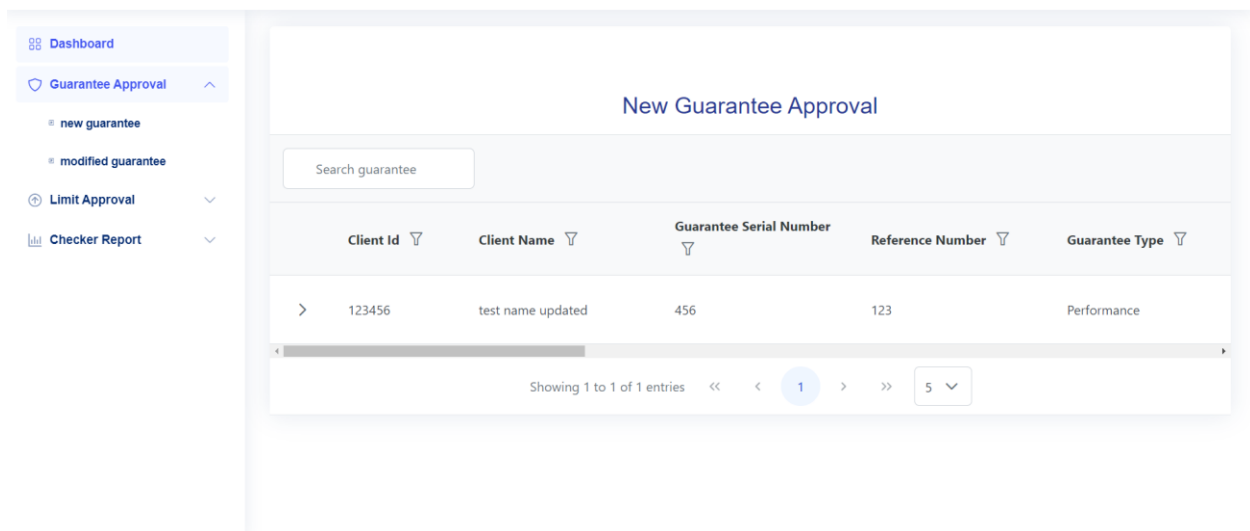
Figure 18: new pending guarantee sub-menu

Figure 19: new guarantee approval

New Guarantee Actions:

- Click on the drop down arrow (B1) as shown in Figure 20 to take action.
- Click on "details" button (B2) as shown in Figure 20 which will pop up a modal as shown in Figure 21.
- To authorize a new guarantee, click on "authorize" button (B3) as shown in Figure 20.
- A confirmation dialogue will pop up as shown in Figure 22.
- Click on "Yes" button (B1) to confirm and "No" button (B2) to cancel request as shown in Figure 22.

- When successful, you will be shown a success message and guarantee will be removed from the table.
- To return a new guarantee, click on "return" button (B4) as shown in Figure 20.
- A modal will pop up that requires you to input a remark (reason for rejection) as shown in Figure 23.
- Click on the "save" button (B1) to submit or "cancel" button (B2) to cancel the return request as shown in Figure 23.
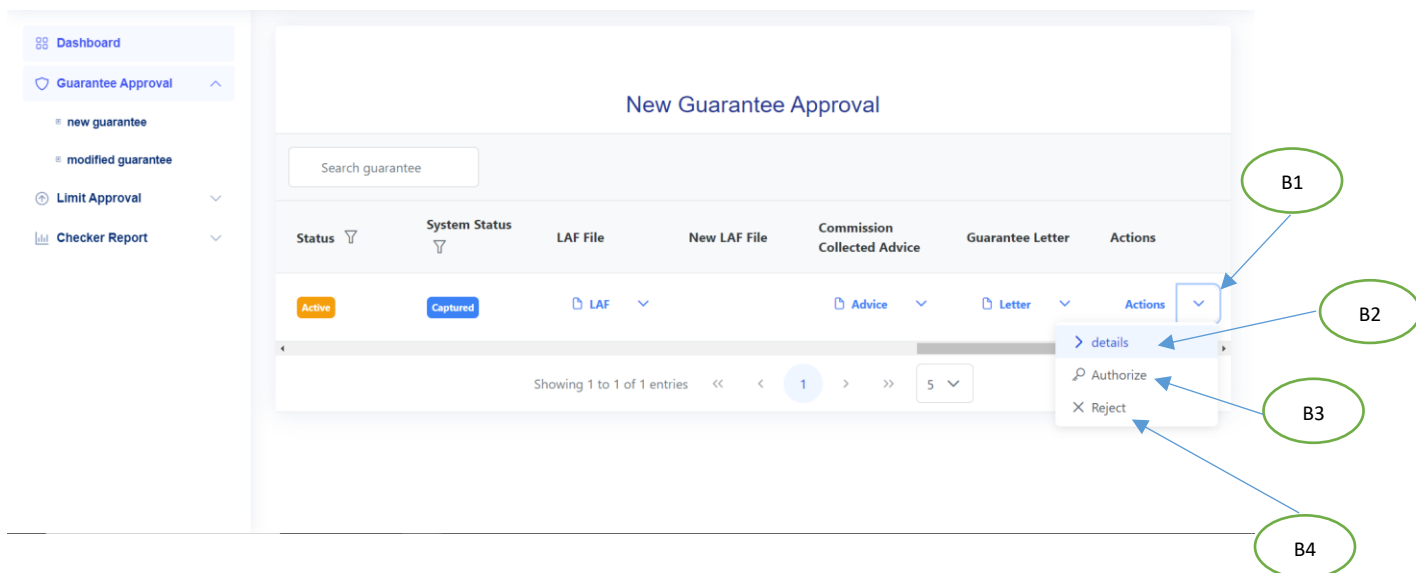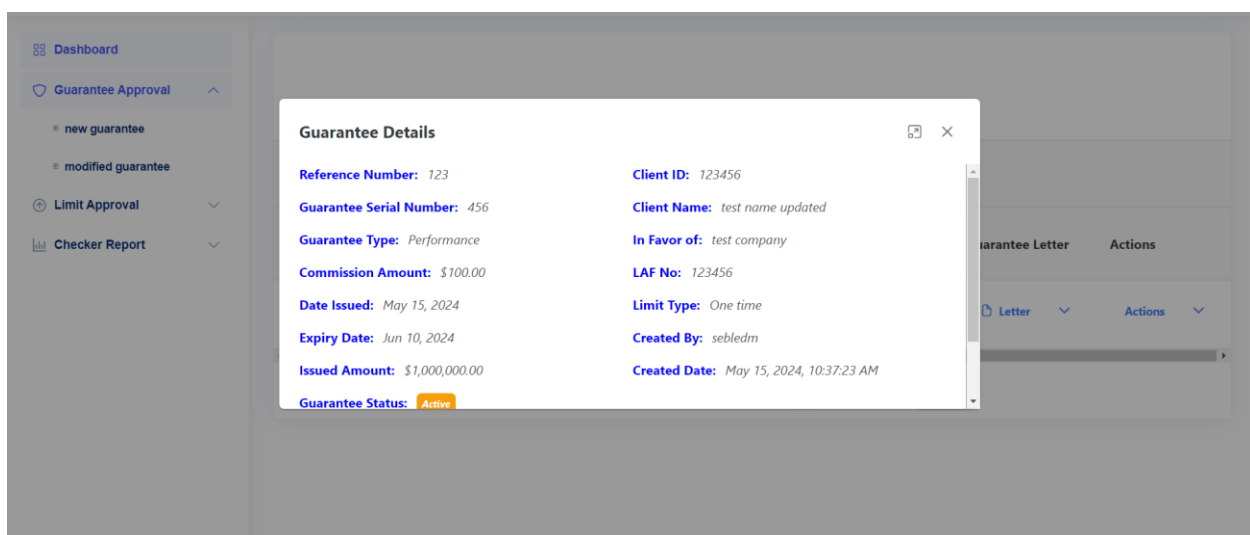

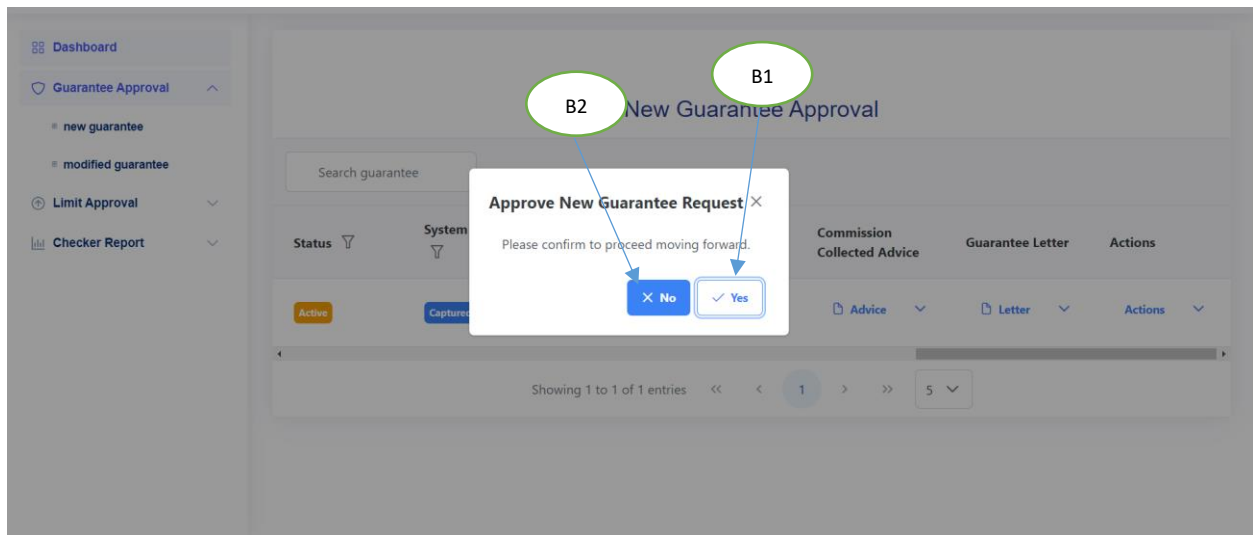*Figure 20: new guarantee approval actions*

Figure 21: new guarantee details
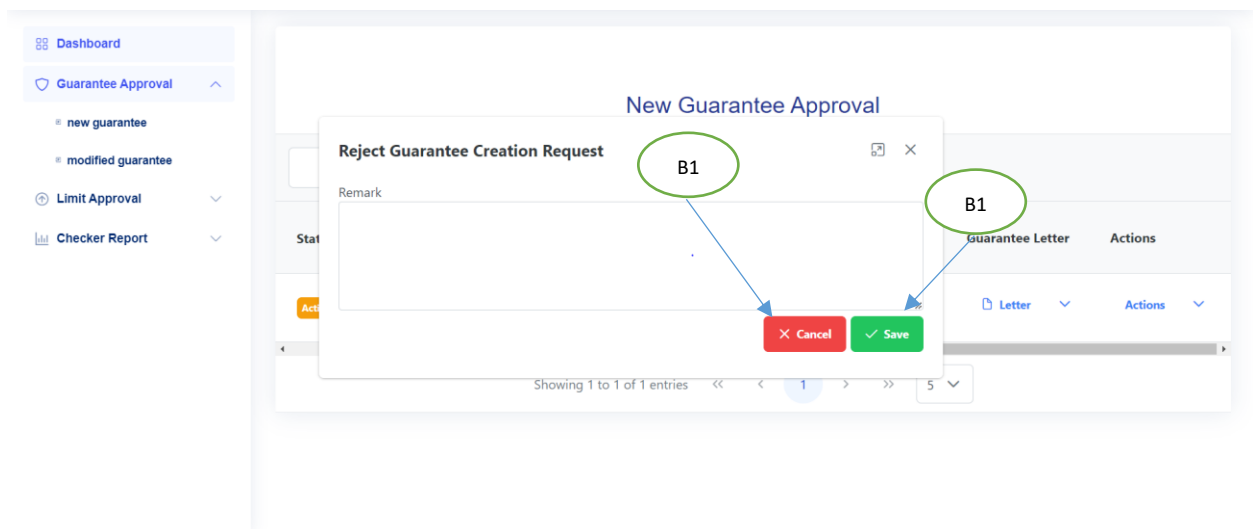
Figure 22: new guarantee approval

Figure 23: new guarantee return remark

Modified Pending Guarantee

Modified Guarantee:

- To approve or return a modified pending guarantee, click on the sub menu "modified guarantee" (B1) or click on the three dots in the "modified pending guarantees" box (B2) which will drop down a modal that has "approval" (B3) as more info as shown in Figure 24.
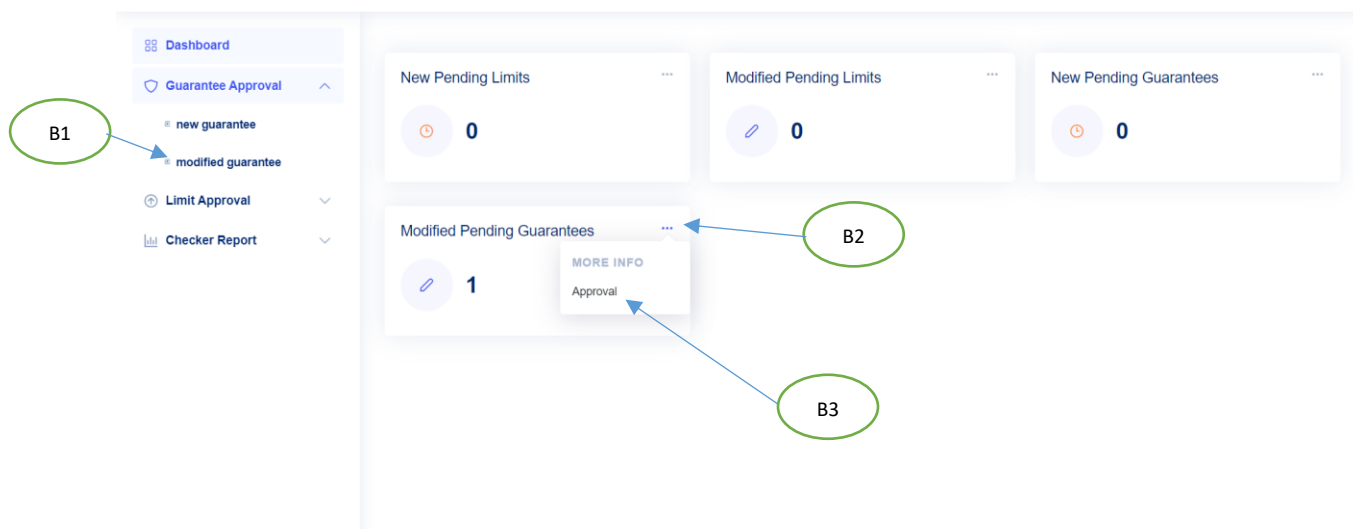- After that you will be directed to a page as shown in Figure 25.

Figure 24: modified guarantee sub-menu

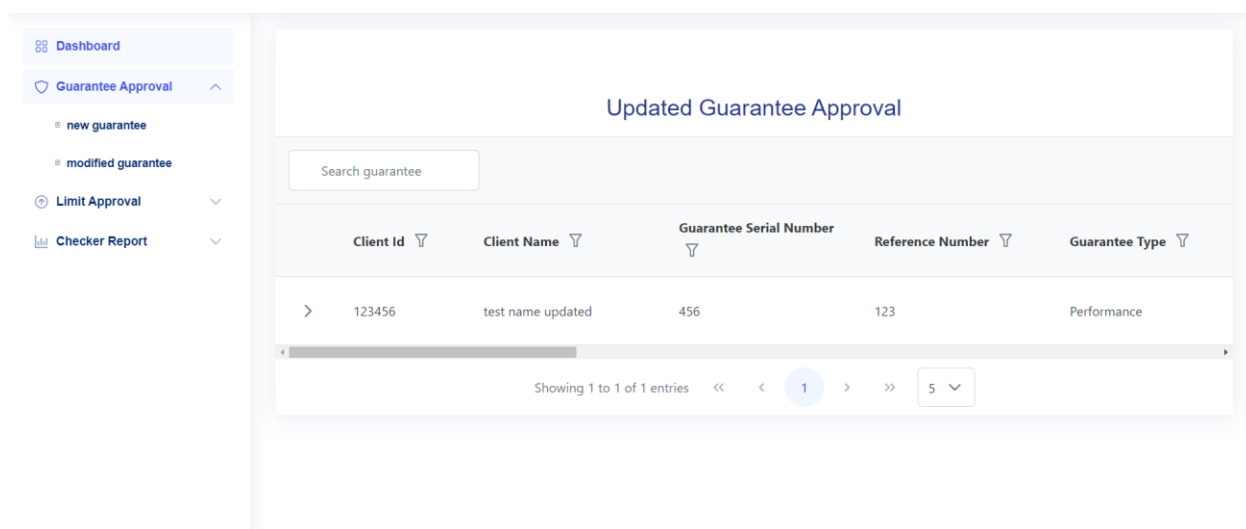*Figure 25: modified guarantee approval*

Modified Guarantee Actions:

- Click on the drop down arrow (B1) as shown in Figure 26 to take action.
- Click on "details" button (B2) as shown in Figure 26 which will pop up a modal as shown in Figure 27.
- To authorize a modified guarantee, click on "authorize" button (B3) as shown in Figure 26.
- A confirmation dialogue will pop up as shown in Figure 28.

- Click on "Yes" button (B1) to confirm and "No" button (B2) to cancel request as shown in Figure 28.
- When successful, you will be shown a success message and guarantee will be removed from the table.
- To return a modified guarantee, click on "return" button (B4) as shown in Figure 26.
- A modal will pop up that requires you to input a remark (reason for rejection) as shown in Figure 29.
- Click on the "save" button (B1) to submit or "cancel" button (B2) to cancel the return request as shown in Figure 29.
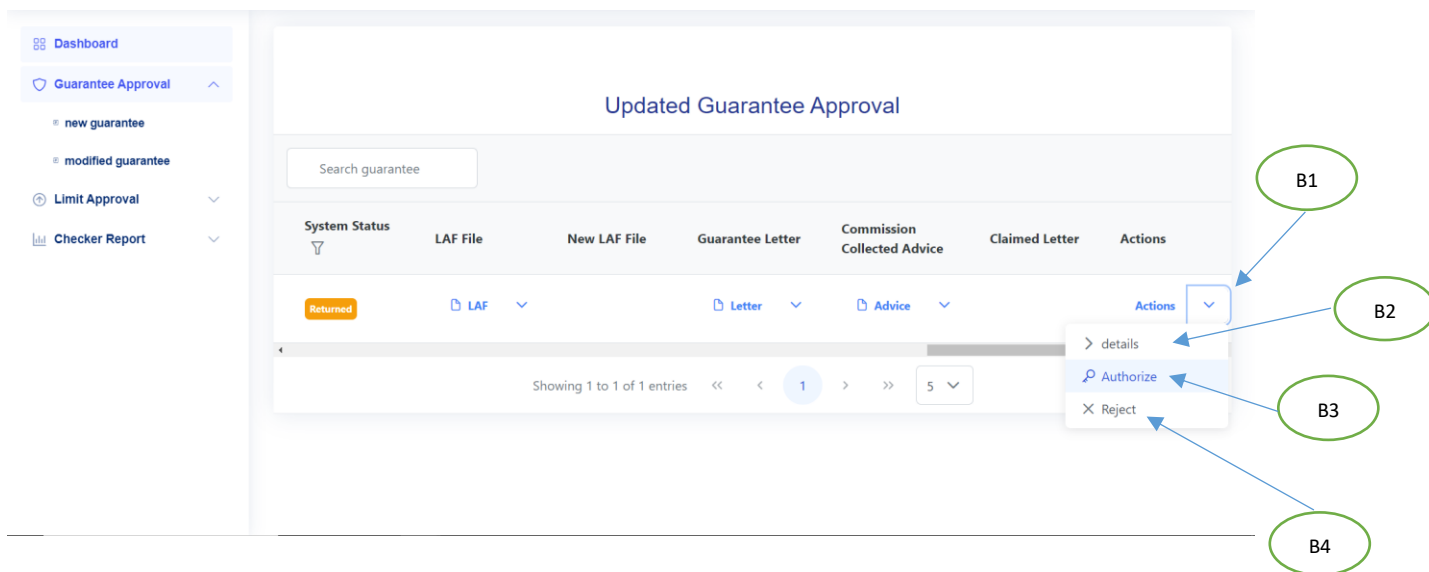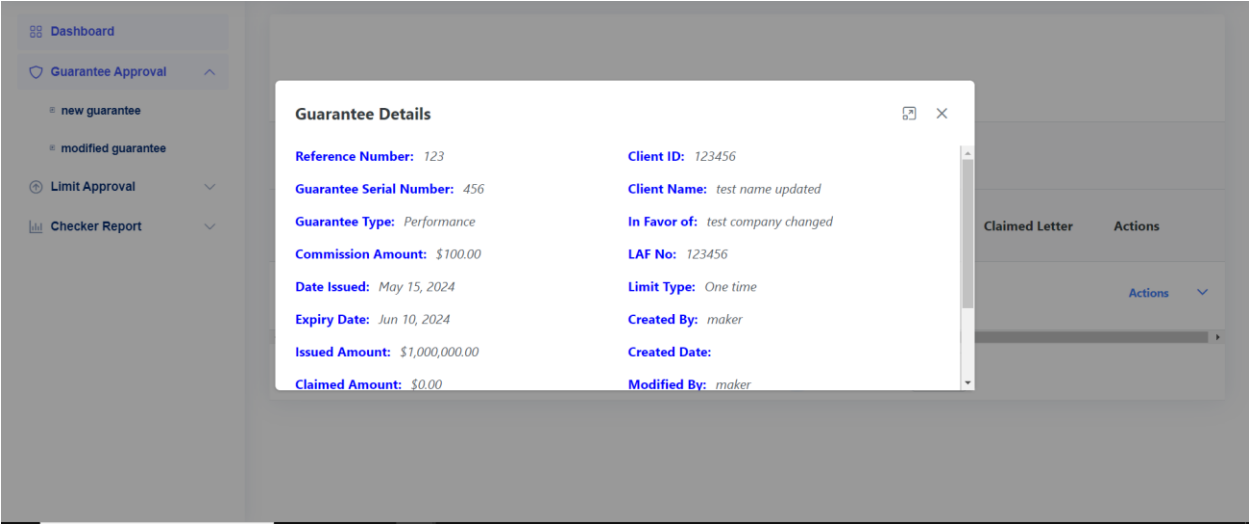

Figure 26: modified guarantee actions
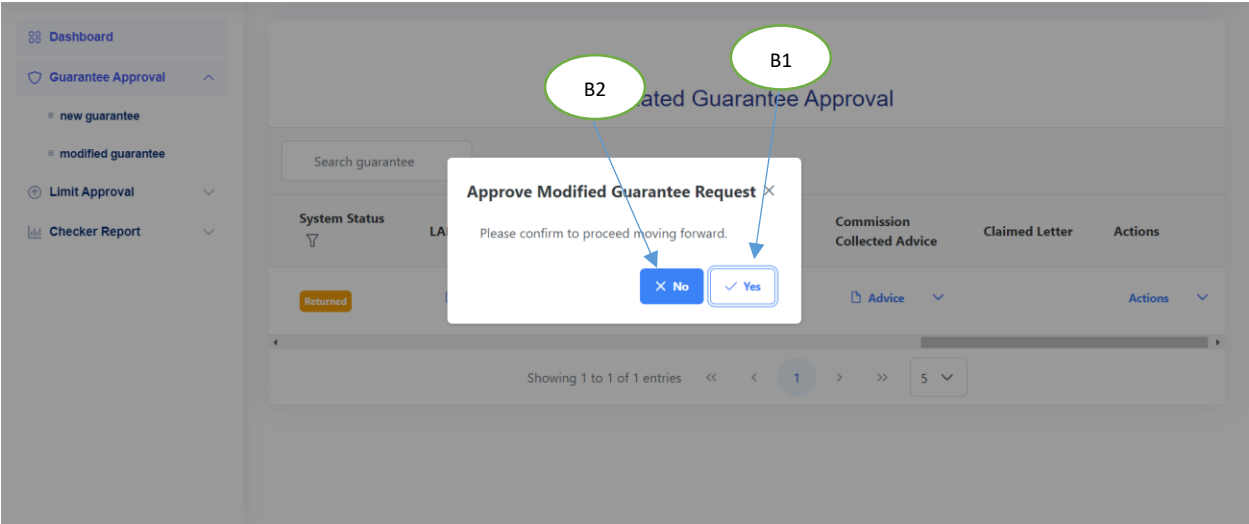
Figure 27: modified guarantee details

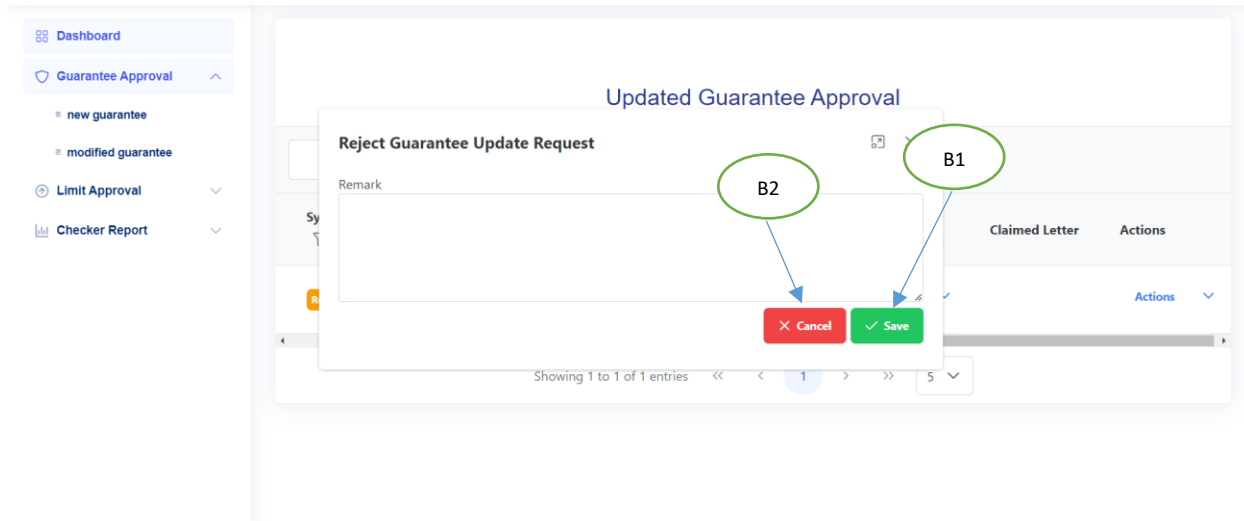*Figure 28: modified guarantee approval confirmation*

Figure 29: modified guarantee return remark

Report

Checker report:

- To view checker report, click on "branch report" sub-menu (M1) as shown in Figure 30.
- After that you will be redirected to a page as shown in Figure 31.
- You can load all report by clicking on the button "load all report" (B1) or apply filter by selecting from filter options then click on the button "apply filter" (B2) as shown in Figure 31.
- Selected filters will be displayed as shown in Figure 32(D1).
- To export report to excel, click on (B1) and to export to pdf, click on (B2) as shown in Figure 33.
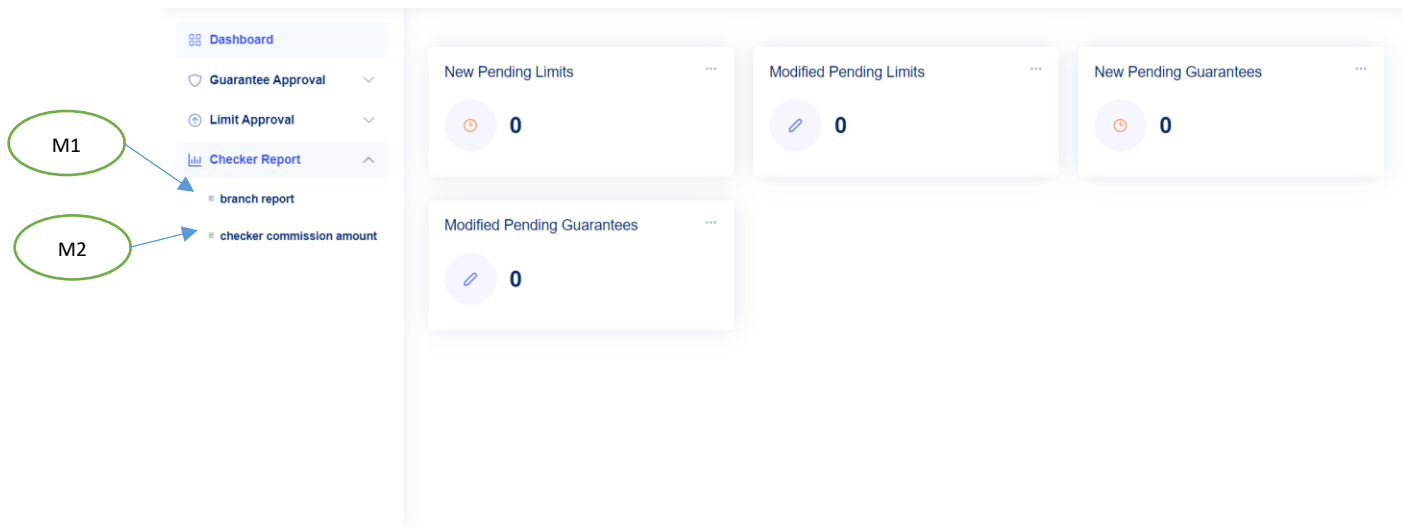
M1

M2

New Pending Limits ⋯
🕐 **0**

Modified Pending Limits ⋯
✏️ **0**

New Pending Guarantees ⋯
🕐 **0**

Modified Pending Guarantees ⋯
✏️ **0**

Dashboard
🛡 Guarantee Approval ⌄
⊕ Limit Approval ⌄
📊 Checker Report ⌃
⊟ branch report
⊟ checker commission amount

Figure 30: checker report sub-menu

Dashboard
🛡 Guarantee Approval ⌄
⊕ Limit Approval ⌄
📊 Checker Report ⌃
⊟ branch report
⊟ checker commission amount

Select Category ⌄

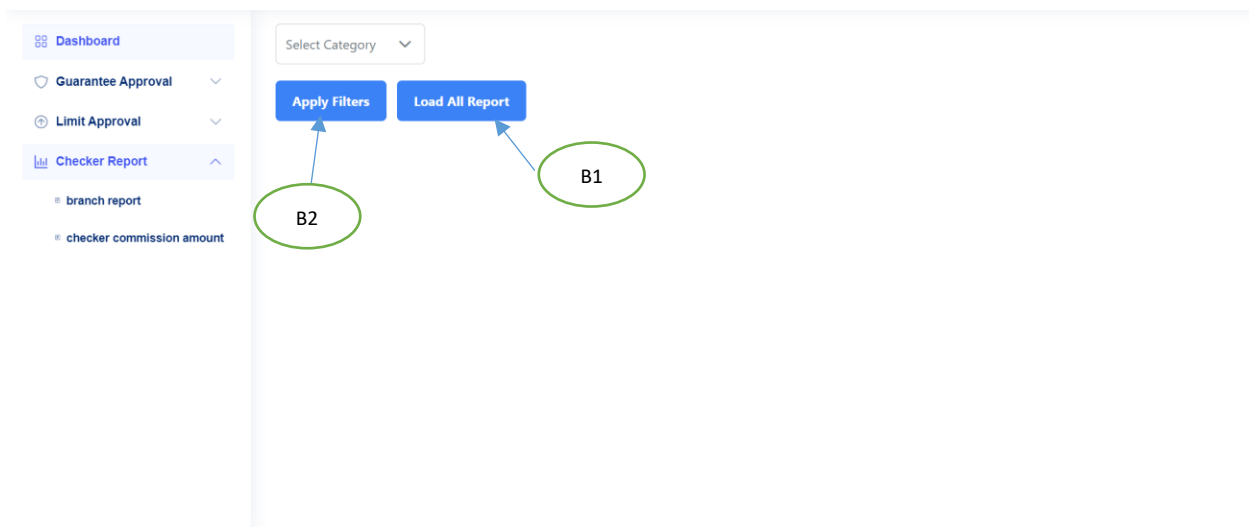Apply Filters   Load All Report

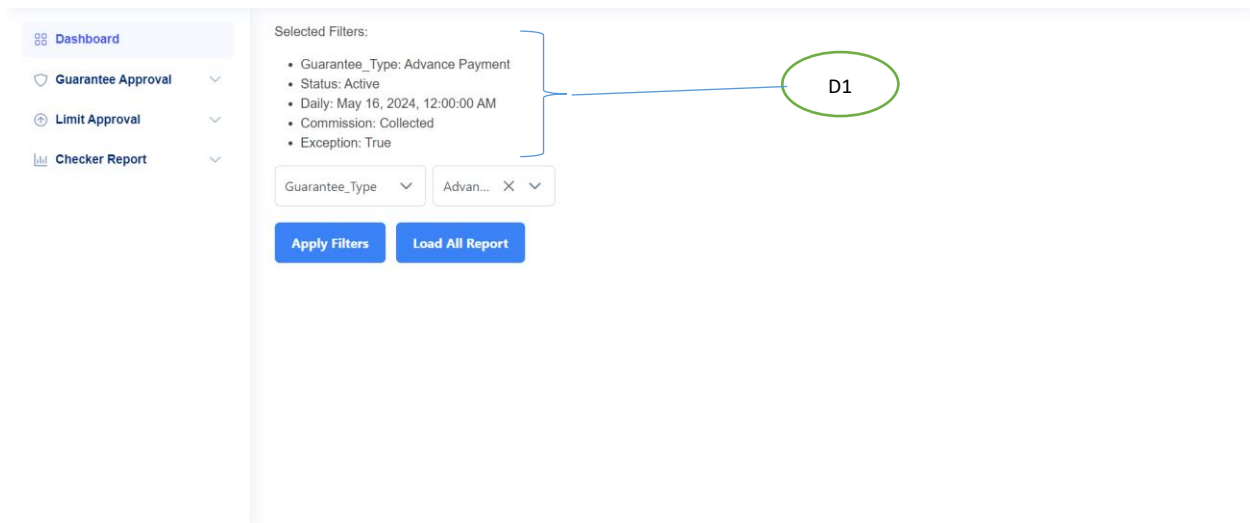B1

B2

Figure 31: checker report
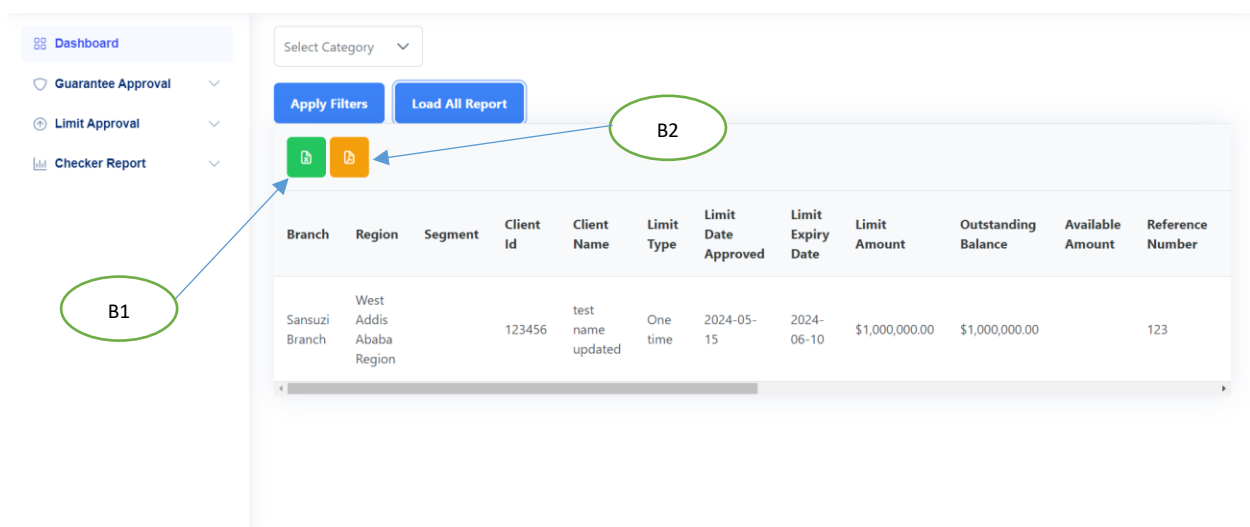
Figure 32: selected filters

Figure 33: branch report export

Commission Amount Report:

- To view commission amount report, click on "commission amount" sub-menu (M2) as shown in Figure 30.
- After that you will be redirected to a page as shown in Figure 34.
- Click on "Load report" button (B1) as shown in Figure 34.
- You can select date range (B2) filter method which is optional as shown in Figure 34.
- To export the loaded report to excel, click on B1 (Figure 35).
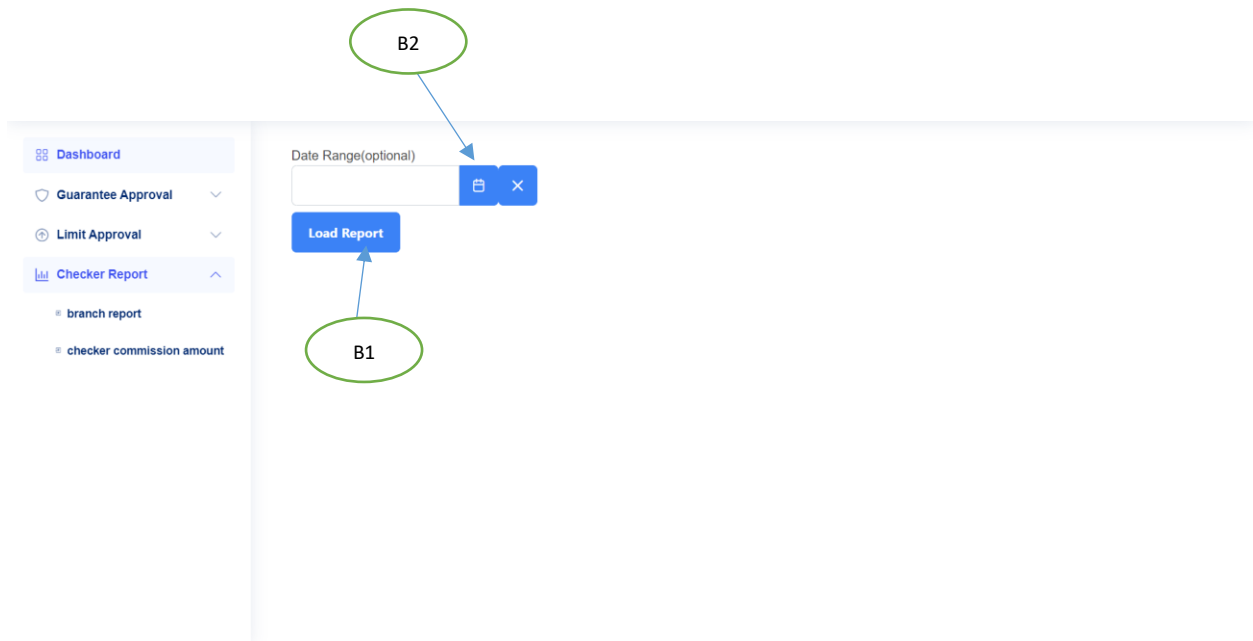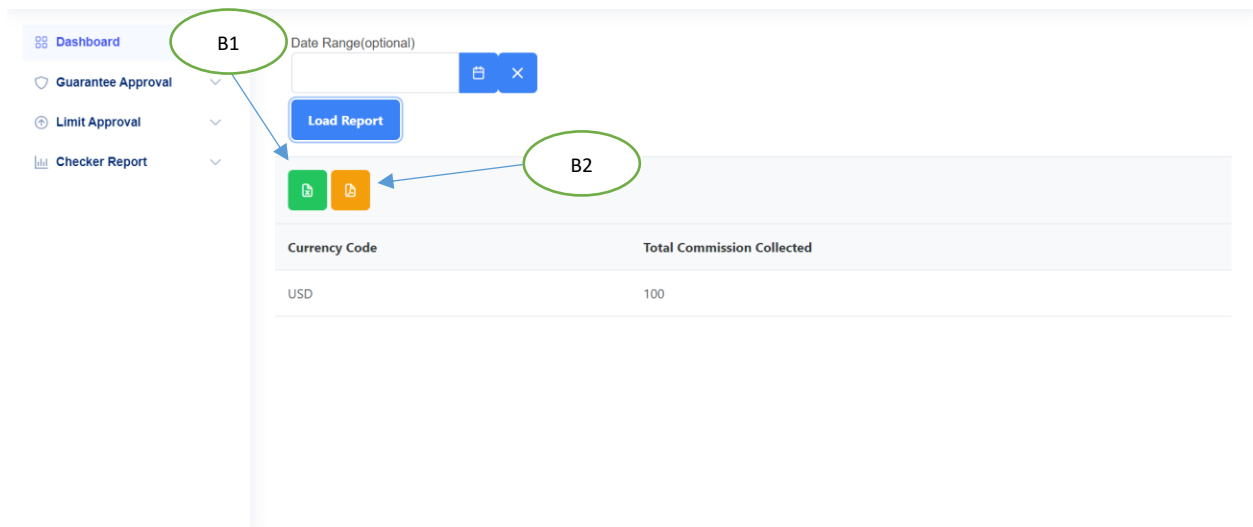- To export the loaded report to pdf, click on B2 (Figure 35).

Figure 34: checker commission amount

Figure 35: commission amount report export