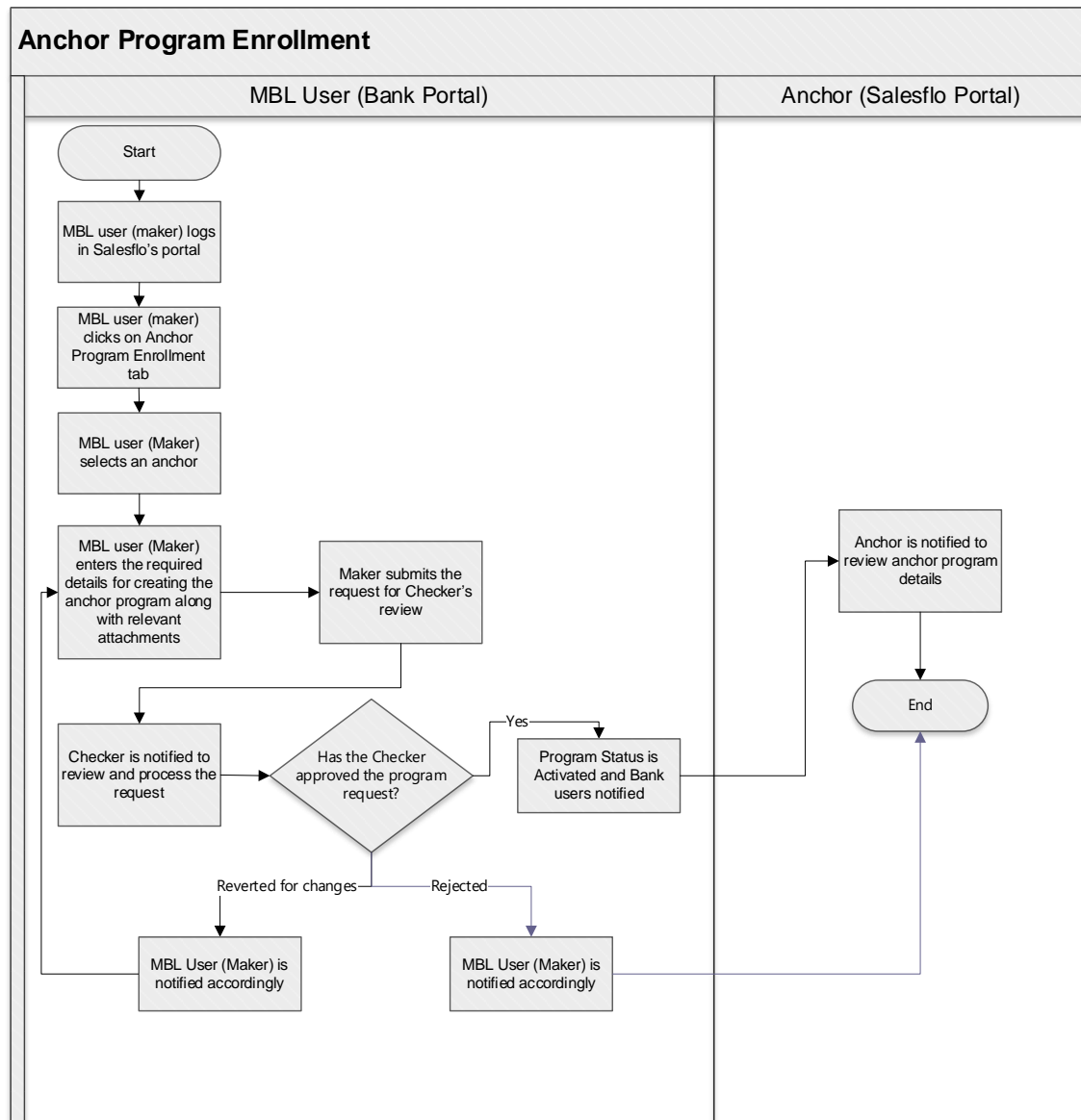


Bank Portal

1. Anchor Program Enrollment

Anchor Program Enrollment module will enable MBL user to create a program to enroll the anchor in the financing program.

Process Flow



Note: Multiple Programs may be created against an anchor.

BUT if a financing scheme program has been created, it cannot be created again.

Process Description

Anchor Program Enrollment

S.No	Activity	Description	System	Responsibility
1	Bank user (Maker) clicks on Anchor Program Enrollment Tab		Bank Portal	Business Unit-Maker
2	Bank user (Maker) selects an anchor through drop down option	<p>Only approved anchor's names would be displayed in the drop down.</p> <p>User shall be able to search the anchor through search option</p>	Bank Portal	Business Unit-Maker
3	Bank user (Maker) fills the required input fields and initiates the approval process	Detail of Fields shown in associated fields section	Bank Portal	Business Unit-Maker
4	Bank user (Checker) reviews the approval request in Anchor Program Enrollment Tab	<p>If approver reverts the request, Maker would be notified accordingly. Maker can review the comments section to determine why the request was reverted.</p> <p>If approver rejects the request, Maker would be notified that the request was rejected.</p> <p>Once the request is approved, Program will be activated and a notification will be sent to the anchor.</p>	Bank Portal	Business Unit-Checker

5	Anchor Program details are visible in Anchor Portal		Anchor Portal	Salesflo System

Note: Multiple Programs may be created against an anchor.

BUT if a financing scheme program has been created, it cannot be created again.

Wireframes

Bank Portal

- 1) Bank User (Maker) logs in to Salesflo's portal and clicks on the Anchor Program Enrollment Tab.

Log In Screen for Maker – MBL

The wireframe shows a login interface for the Bank Portal. At the top, there is a header bar with the Salesflo logo on the left and the Meezan Bank logo on the right. Below the header, the main content area features a 'System Login' box. This box contains a 'User Name' input field, a 'Password' input field with masked characters (dots), a 'Forgot Password?' link, and a 'LOGIN' button. To the right of the password field is a padlock icon. The footer of the page contains a dark bar with white text linking to 'Terms & Conditions', 'Privacy Policy', and 'Contact Us', and a copyright notice: '© 2022 - salesflo.com - Developed by Retailistan'.

After Anchor Profile is approved, the Profile lands in Bank Portal in “Anchor Program Approval” tab with ‘Active’ status only. The Anchor Program Approval tab can be viewed by every Bank user but First Approval to be done by the Maker.

Anchor Program Enrollment

Anchor Code	Anchor Name	Anchor Status	Request Status
		Active	Maker Approval Pending
		Active	Maker Approval Pending
		Active	Maker Approval Pending

- 2) Bank user (Maker) selects an anchor through drop down option.
- Only approved anchor's names would be displayed in the drop down.
 - User shall be able to search the anchor through search option.

Anchor Program Enrollment Screen for Approval by Maker (Financing Portal)

Anchor Program Enrollment Maker Approval

Select Anchor :

Select Anchor

Select an Anchor

Engro MIS [D0002]
SHAN DISTRIBUTOR [D70000472]
SHAN DISTRIBUTOR - II [D70000611]
PACIFIC DISTRIBUTORS [

- 3) Bank user (Maker) fills the required input fields and initiates the approval process.

S.No	Fields	Description	Field
1	Program Name	Name of the Program	Text
2	Program Size	Total value of the program	Numeric
3	Program Type	Distributor Financing (Pre-defined)	Text
4	Financing Scheme	Drop down Menu with predefined financing schemes will be displayed. E.g. Currently I-SAAF and NON I-SAAF	Text

		scheme would be displayed here. Similarly, in future any other schemes added will be shown here.	
5	Program Start Date	Start Date of the program	Numeric
6	Program Renewal Date	Renewal due date of the program	Numeric
7	Program Duration	System will automatically calculate the duration based on the start and end date	Numeric
8	Per Distributor Maximum Limit	Maximum limit that can be allotted to a distributor under this program	Numeric
9	Recourse Type	Drop down menu with predefined options will be shown covering what recourse type is the Anchor Offering: <ol style="list-style-type: none"> 1. Letter of Comfort 2. Stop Supply Letter 3. Personal Guarantee 	Text
11	Bank Spread	Profit percentage charged on a transaction above/below KIBOR	Numeric
12	Assigned Bank Team	Bank team that would be assigned to the anchor	Text

When Maker clicks on **Select Anchor** the following screen cells open.

Anchor Program Enrollment
Maker Approval

Select Anchor

Program Name

Program Size

Program Type Predefined cell

Financing Scheme Drop down with the following options:
1) I-SAAF
2) NON I-SAAF

Program Start Date

Program Renewal Date

Program Duration Automatically calculate.
Formula:
End Date - Start Date

Per Distributor Maximum Limit

Recourse Type Drop down with the following options:
1) Letter of Comfort
2) Stop Supply Letter
3) Personal Guarantee

KIBOR Rate

Bank Spread

Assigned Bank Team

4) Bank User (Checker) reviews the approval request in Anchor Program Enrollment Tab.

When Maker submits the Enrollment, Checker is notified to review and process the request.

Log In Screen for Checker – MBL

System Login

User Name

Password

[Forgot Password ?](#)



Terms & Conditions | Privacy Policy | Contact Us
© 2012 - salesflo.com - Developed by NetSolstice

Anchor Program Enrollment Screen for Approval by Checker

Anchor Program Enrollment Checker Approval

Anchor Code	Anchor Name	Anchor Status	Request Status
		Active	Checker Approval Pending
		Active	Checker Approval Pending
		Active	Checker Approval Pending

When the Checker single clicks a particular anchor row, the below screen opens with the anchor details and attachments.

Anchor Program Enrollment Checker Approval

Anchor Name

Anchor Name

Program Name

Program Name

Program Size

Program Size

Program Type

Distributor Financing

Financing Scheme

Select

Program Start Date

Start Date

Program Renewal Date

Renewal Date

Program Duration

Duration Days

Per Distributor Maximum Limit

Maximum Limit

Recourse Type

Select

KIBOR Rate

KIBOR Rate

Bank Spread

Bank Spread

Assigned Bank Team

Bank Team

Comments

Reject

Revert

Approve

Reject :

If the Checker rejects the request, Maker would be notified via email that the request was rejected with comments from the Checker.

Request Status column will state **"Checker Rejected"**

Anchor Code	Anchor Name	Anchor Status	Request Status
		Active	Checker Rejected

Revert :

If the Checker reverts the request, Maker would be notified accordingly. Maker can review the comments section to determine why the request was reverted.

This notification will go via email to the Maker that the request has been reverted.

The Anchor Profile screen (shown below) will go back to the Maker to input additional information to the request. Maker can review the comments section for reasons why request was reverted.

Request Status column will state **“Maker Approval Pending”**

The screenshot displays the 'Anchor Program Enrollment' interface. At the top, there is a header with the Salesflo logo and the Meezan Bank logo. Below the header, the title 'Anchor Program Enrollment' is centered. A table shows the request status as 'Maker Approval Pending'. The main form area is titled 'Anchor Program Enrollment Maker Approval' and includes a 'Select Distributor' dropdown set to 'Engro MIS [D0002]'. The form contains various input fields for program details, a 'Submit' button, and a 'Checker comments' section on the right.

Anchor Code	Anchor Name	Anchor Status	Request Status
		Active	Maker Approval Pending

Anchor Program Enrollment
Maker Approval

Select Distributor: Engro MIS [D0002]

Program Name:

Program Size:

Program Type:

Financing Scheme:

Program Start Date:

Program Renewal Date:

Program Duration:

Per Distributor Maximum Limit:

Recourse Type:

KIBOR Rate:

Bank Spread:

Assigned Bank Team:

Checker comments

Approve :

Once the Checker approves the request, Program will be activated, and a notification will be sent to the anchor.

Anchor will get notification via email that their Program with details has been Approved.

Request Status column will state **“Approved”**

Anchor Code	Anchor Name	Anchor Status	Request Status
		Active	Approved