

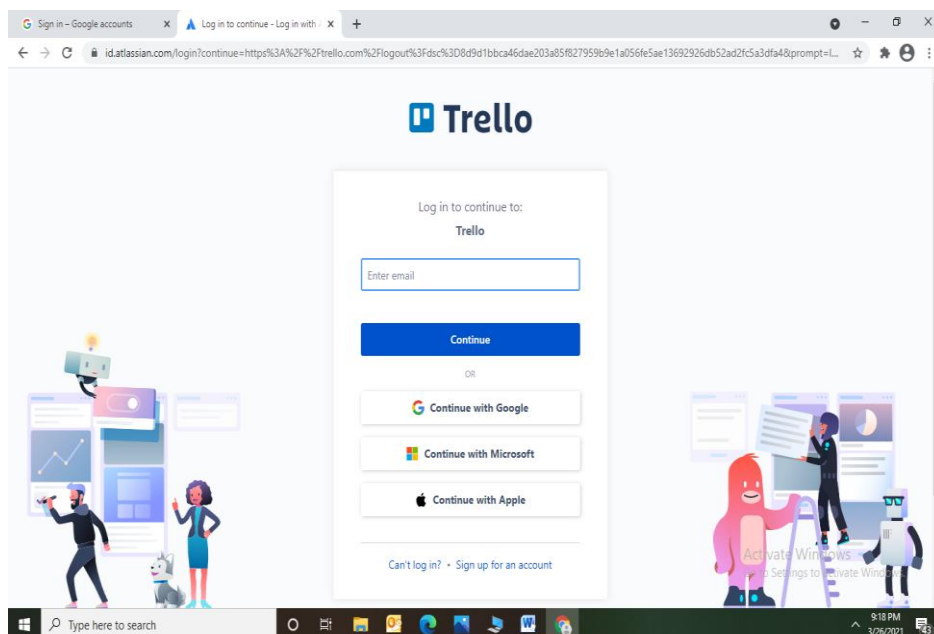
12. Create a workflow for Education Loan approval in Bank.

Loan Application Procedure

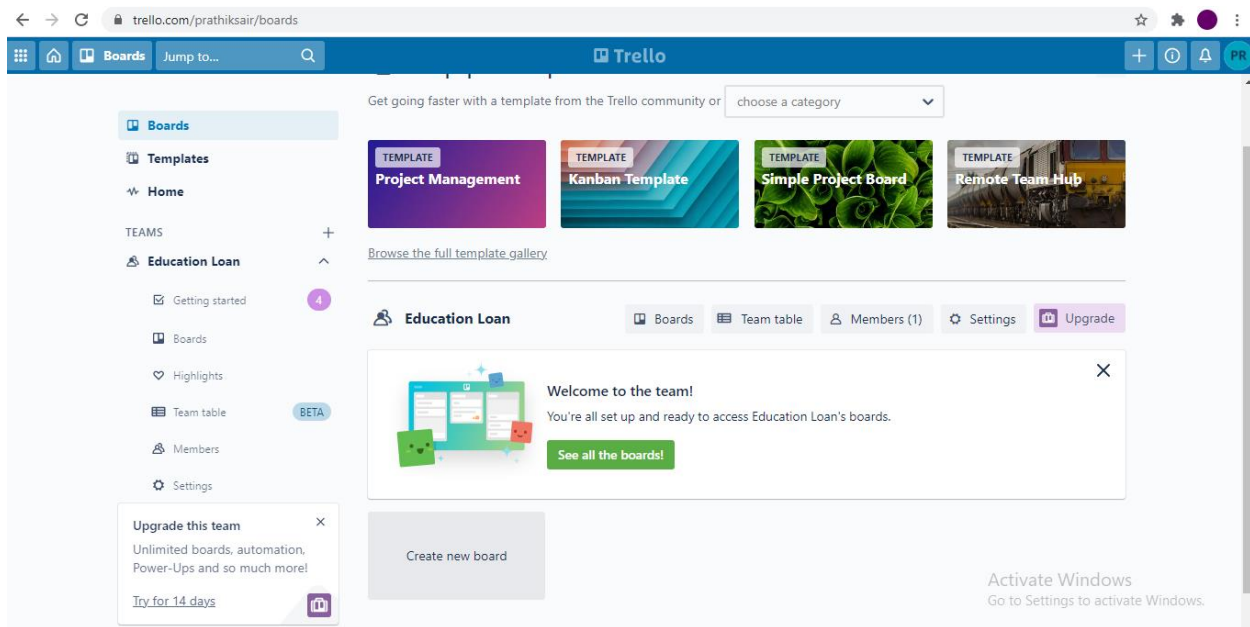
1. Student/his father/guardian approach the bank with application for education loan. Manager verifies the application and sends it to loans processing officer.
2. Officer interviews the applicant and gives report to manager.
3. Manager checks the report from Officer and accepts/rejects the loan proposal.
4. If manager accepts the proposal, the client must submit necessary documents to the bank.
5. Manager then approves the loan and sends pay order to college.

Workflow using Trello Software

Step 1: Login to Trello using your Gmail Account using the link <https://trello.com/en/login> and login through your g-mail by clicking on “Continue with Gmail”

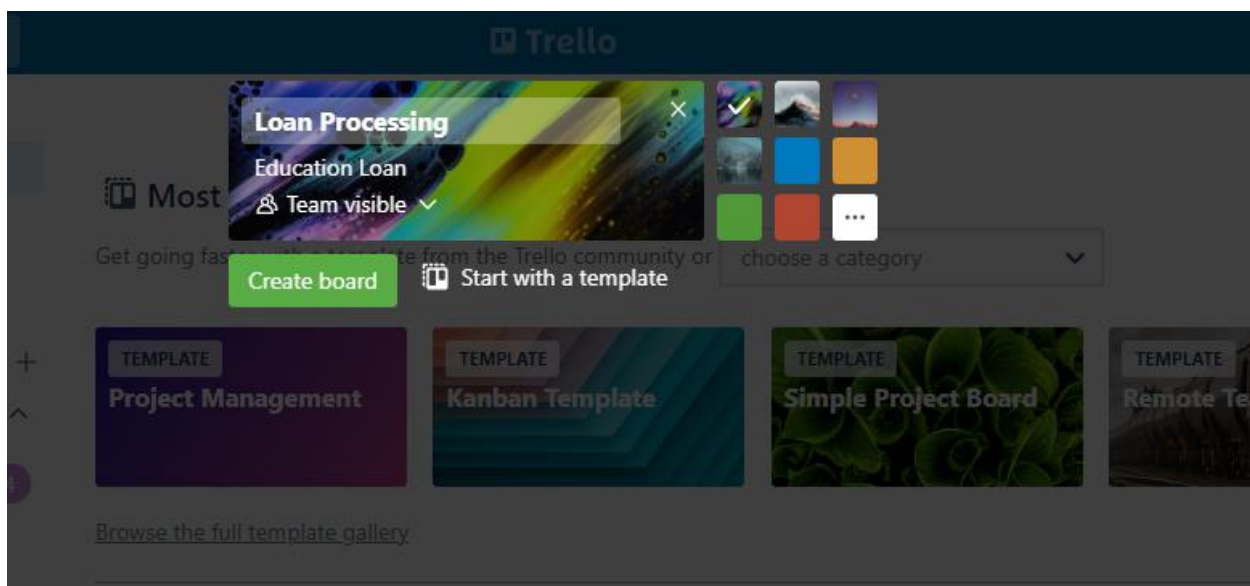


Step 2: Give appropriate Team name and select team type from the dropdown.

Step 3: Click on “create new board”**Step 4: Give a board name and select the board visibility from the dropdown.**

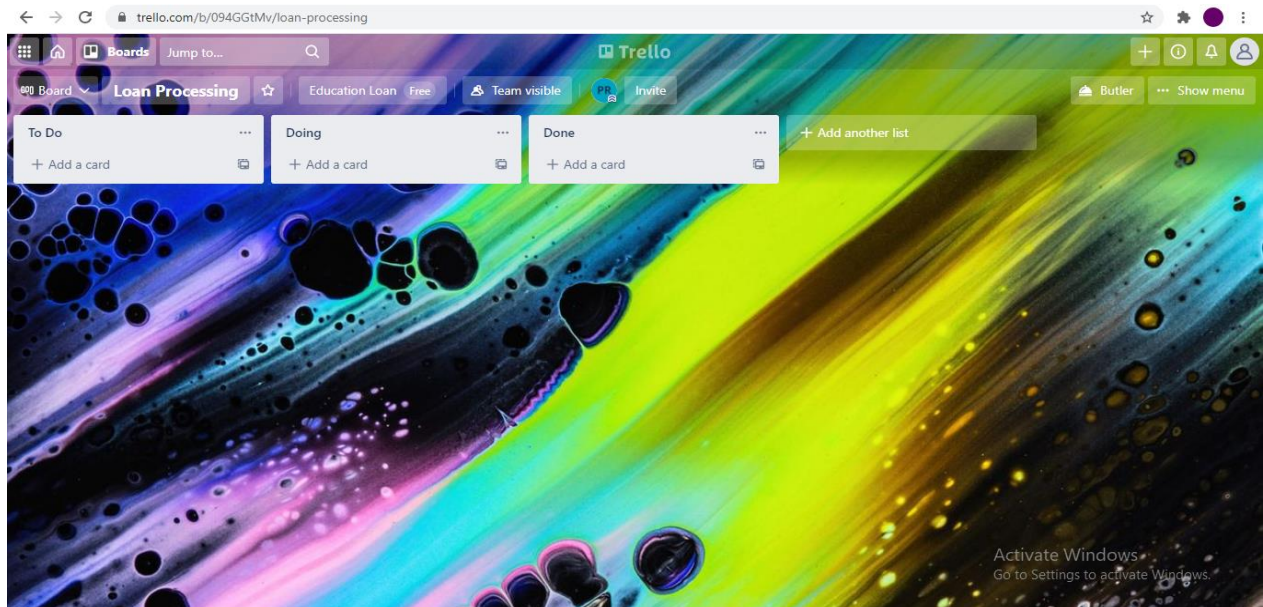
Visibility options

- Private
- Team
- Board members

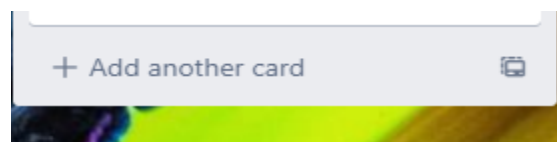


Step 5: Create List by clicking on add list button. There are five lists as follows:

1. Manager Verification
2. Officer Verification
3. Manager Approval
4. Client Record Submission
5. Pay Order to College



Step 6: Create a card for every loan application with the applicant's name as the card name in the appropriate list.

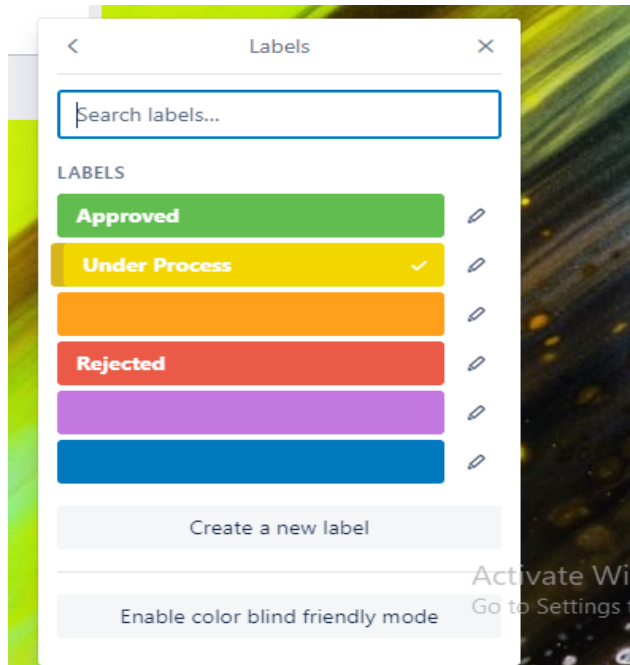


Step 7: One or more labels can be added for every card(optional) for quick analysis of the status. The following three labels are created with different colors

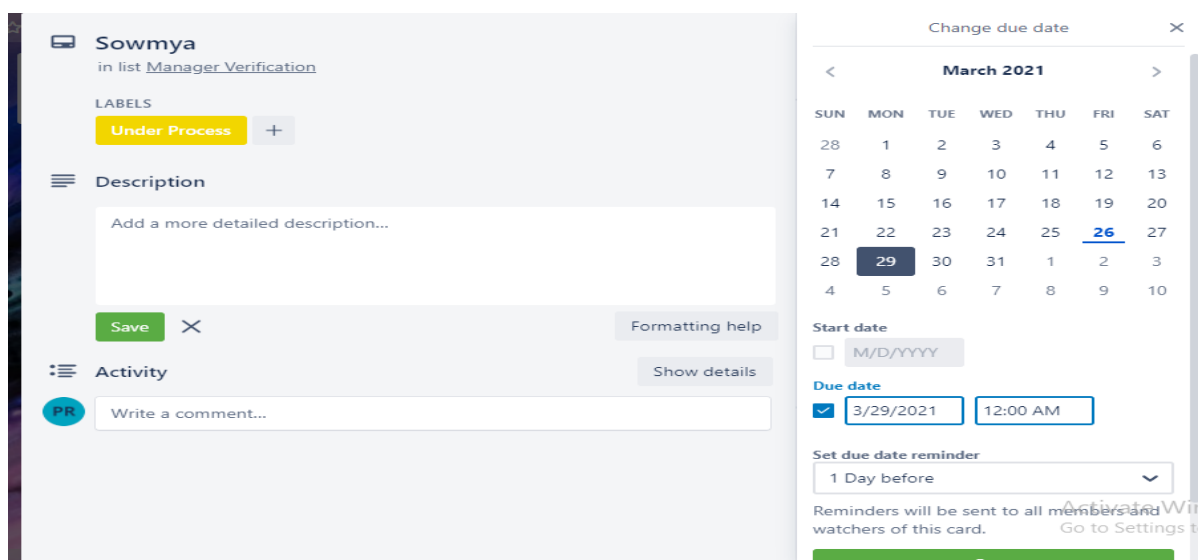
Green Color→Approved

Yellow Color→ Under Process

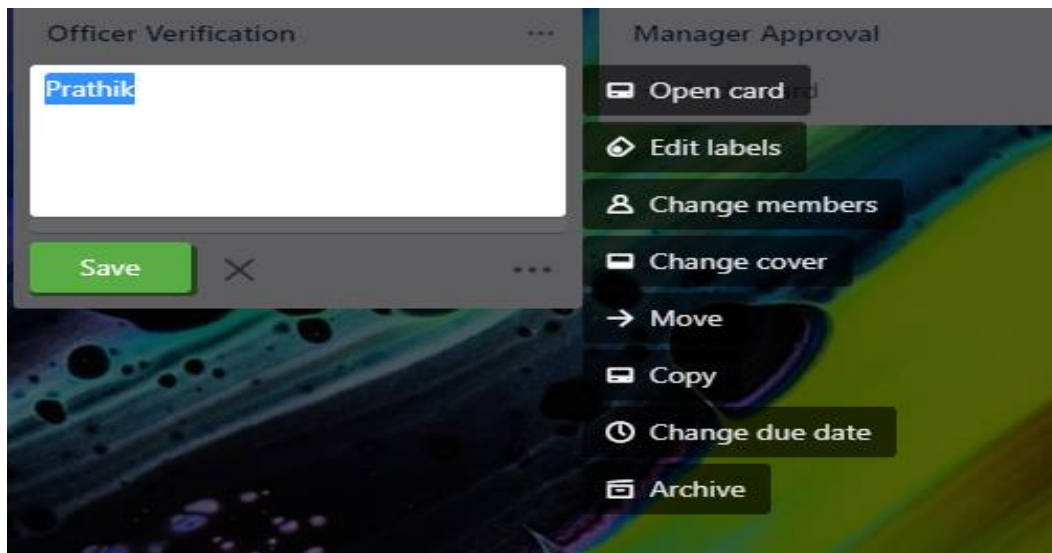
Red Color→ Rejected



Step 8: You can set due date for every card by clicking on edit icon in each card.



Step 9: Some of the other actions you can perform with the card are shown in the screenshot.



Step 10: Below is the demo workflow with loan applications

