# Process Name: Credit Offer Acceptance and Required Document Communication

This process outlines the steps taken after a customer accepts a credit offer. It involves updating the customer's credit request status in the RPA Bank Credit Application, and then identifying and communicating the required documents to the customer via email.

## List of applications

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| **Application Name** | **Type** | **URL** |
| RPA Bank Credit Application | web application | https://creditapp-poc.web.app/#/commands |
| Notepad | desktop application |  |
| Credit Management System | web application |  |

### List of steps

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| --- | --- | --- |
| **1.0 Identifying the Accepted Credit Request** | | |
| 1.1 | Access the RPA Bank Credit Application. | 00:12 |
|  | | |
| 1.2 | Navigate to the 'Orders' section and then to the 'Credit requests' tab. | 00:15 |
|  | | |
| 1.3 | Use the search field to filter requests by the reference number (e.g., 'KQP27L') obtained from the customer's acceptance email. | 00:17 |
|  | | |
| 1.4 | Locate the customer's credit request in the 'REQUESTED' status. If not found there, check the 'VERIFIED' and 'CANCELLED' tabs. | 00:20 |
|  | | |

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| **2.0 Updating Credit Request Status** | | |
| 2.1 | Click on the reference number of the identified credit request. | 00:48 |
|  | | |
| 2.2 | In the order details page, select 'Offer accepted' from the dropdown menu. | 00:50 |
|  | | |
| 2.3 | Click the 'SAVE' button to update the status. | 00:56 |
|  | | |

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| **3.0 Identifying and Communicating Required Documents** | | |
| 3.1 | Open the 'Credit Management System' application and enter the credentials ('user', 'admin'). | 01:23 |
|  | | |
| 3.2 | Click the 'Submit' button to access the system. | 01:30 |
|  | | |
| 3.3 | Find the product ID (e.g., '51') from the RPA Bank Credit Application page. | 01:32 |
|  | | |
| 3.4 | Enter the product ID into the 'Credit Management System' search field and click 'Search'. | 01:39 |
|  | | |
| 3.5 | Copy the list of 'Required Documents' displayed in the system. | 01:43 |
|  | | |
| 3.6 | Paste the list of required documents into a new Notepad document for later use in email communication. | 01:48 |
|  | | |

## Exceptions

* Exception: Connection error in RPA Bank Credit Application

Description: A connection error might appear during the saving process in the RPA Bank Credit Application. Click 'OK' on the error message and click the refresh button to retry.

* Exception: Credit request not found

Description: If the credit request is not found in the 'REQUESTED' status, it should be checked in the 'VERIFIED' or 'CANCELLED' statuses.

## Requires Clarification

* The video shows the process for a single credit request. Can you please describe how this process scales for handling multiple requests?
* The video does not cover the actual sending of the email. Please provide details on how the information from the Notepad is incorporated into the email and sent to the customer. Should this be included as an additional step? Which email client is used?
* The video mentions that if a request is cancelled, it is considered a business exception. Can you elaborate on the handling of this business exception, and what additional steps are required in that case?
* The video does not show how to handle data errors. Can we add steps in the process to handle data validation and potential errors?
* What happens if the product ID is not found in the Credit Management System?