



GLOBAL  
BANK

Home

Pending Applications

Yearly Overview

Branch Performance

# How to use this dashboard

*This dashboard was designed to manage mortgage loan activity at different branches of Global Bank.*

## Pending Applications

*This page displays a table of all applications under review and expands each customer's portfolio upon selection.*

- An alert is automatically provided for transactions exceeding \$250,000.
- Borrow score is also provided based on a combination of family and professional status.

## Mortgage Applications

*This page shows the following analysis of loan applications.*

- Application history
- Application approval rate over time
- Total and average loan amounts over time
- Application closure rate per year
- Comparison of social-professional status count over time

## Branch Performance

*This page shows a comparative view of branch performance.*

- Application approval rate per branch
- Branch ranking by number of applications
- Mapped visual of branch location
- Total and average loan amounts per branch
- Application closure rate per branch



GLOBAL  
BANK





Home

Pending Applications

Yearly Overview

Branch Performance

## Pending Applications

Customer No.	Application Date	Transaction Total	Loan Amount	Borrower Score
54	March 10, 2021	\$162,098.37	\$105,860.16	REJECTED 
97	March 10, 2021	\$117,057.08	\$90,778.96	REJECTED 
90	March 16, 2021	\$191,423.89	\$113,291.69	APPROVED 
49	March 18, 2021	\$163,490.95	\$96,759.95	APPROVED 
Totals		\$634,070.29		

*\*Rows will be highlighted red to alert transactions exceeding \$250,000*

## Customer Portfolio

Select a customer no. from the table to open a portfolio

Customer No.	Application No.	Down Payment
<input type="text"/>	<input type="text"/>	<input type="text"/>

Application City:

Family Status:

Customer Age:

Dependent Children:

Income Regularity:

Employment Status:

Socio-Professional Status:

Borrower Score



GLOBAL  
BANK

Home

Pending Applications

Yearly Overview

Branch Performance

This dashboard was created by  
Crioni Love Cuenca

## Yearly Overview

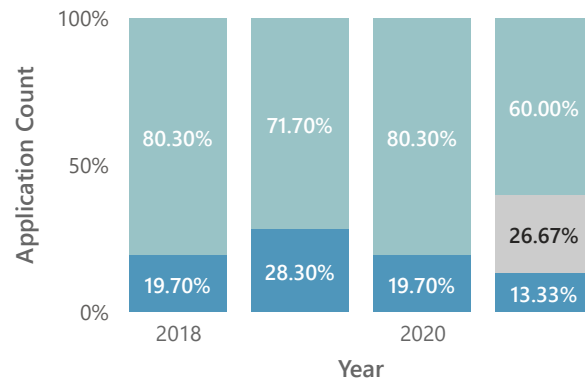
### APPLICATION COUNT

APPROVAL %  
CHANGE FROM  
PRIOR YEAR

-20.30%

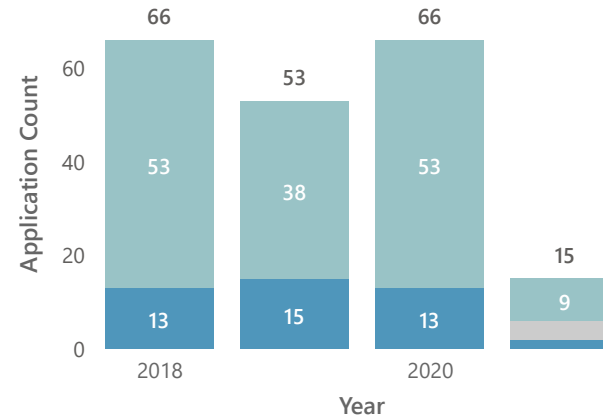
#### Approval Rate by Year

Approved Pending Rejected



#### Total Count by Year and Approval

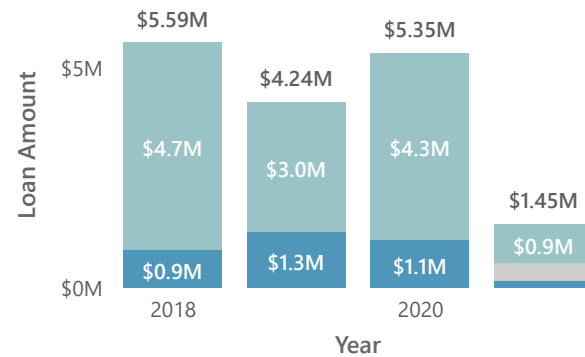
Application Count



### LOAN AMOUNT

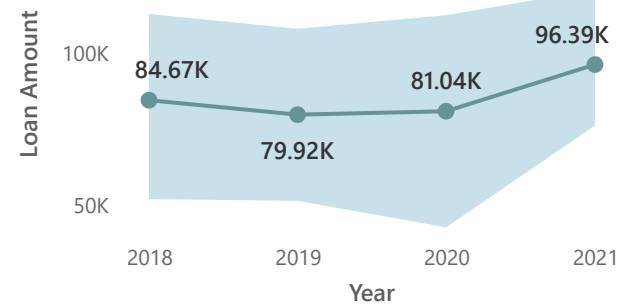
#### Loan Amount by Year and Approval

Approved Pending Rejected



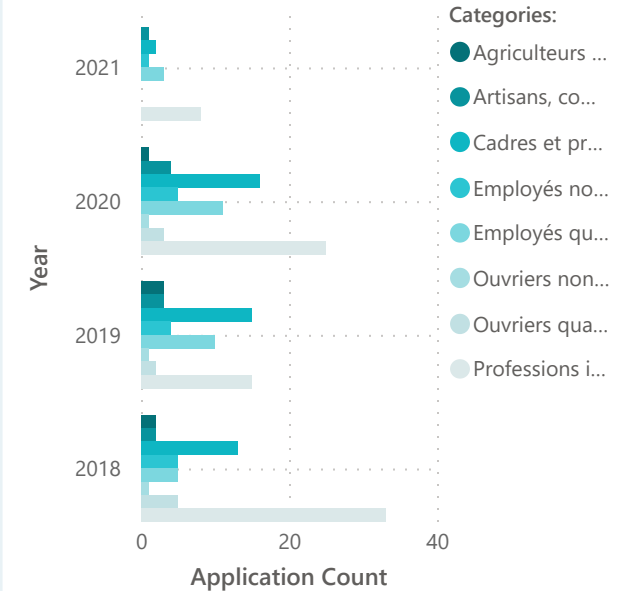
#### Average Value of Approved Loans

with upper and lower quartiles



### SOCIO-PROFESSIONAL STATUS

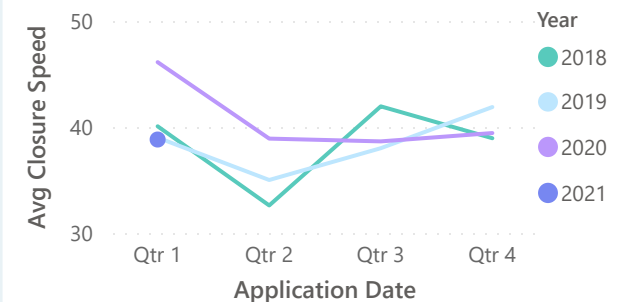
#### Application Count by Year and Socio-Professional Status



### CLOSURE SPEED

#### Application Closure Speed

\*Closure Date: Days between Application Date and Closure Date





GLOBAL  
BANK

Home

Pending Applications

Yearly Overview

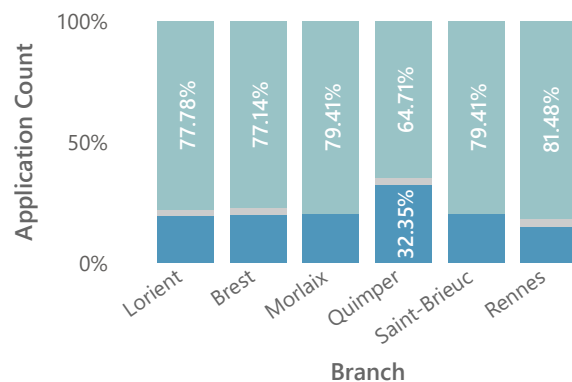
Branch Performance

# Branch Performance

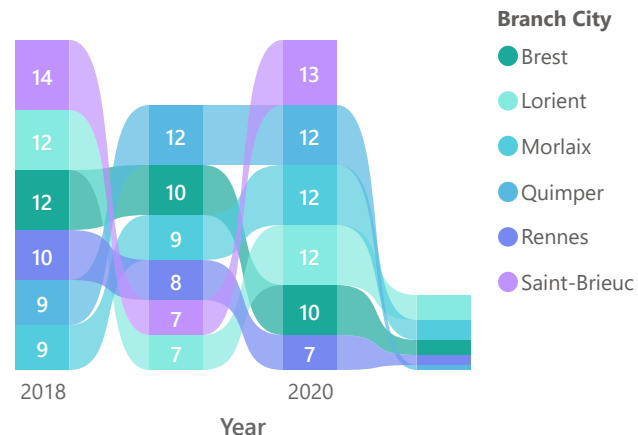
## APPLICATION COUNT

### Approval Rate by Branch

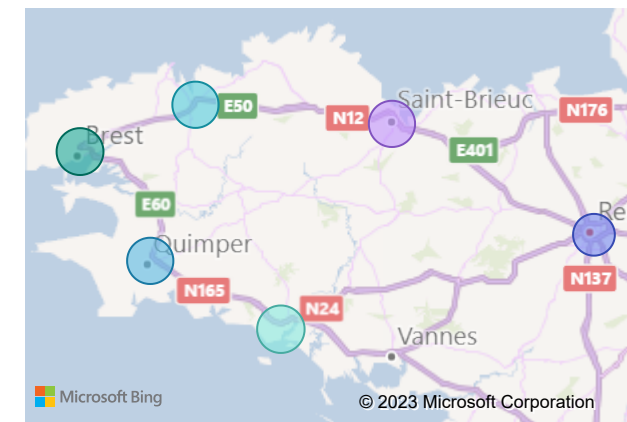
● Approved ● Pending ● Rejected



### Total Count by Branch and Year



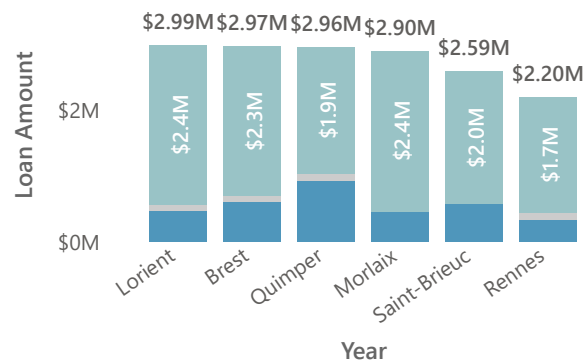
### Total Count by Branch



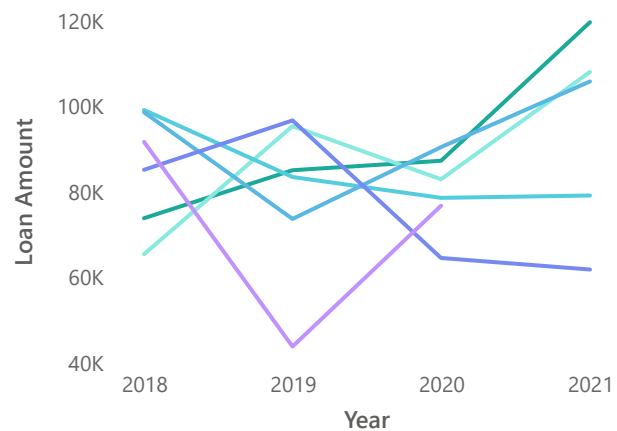
## LOAN AMOUNT

### Loan Amount by Branch and Approval

● Approved ● Pending ● Rejected



### Average Value of Approved Loans by Branch



## CLOSURE SPEED

### Application Closure Speed

\*Closure Date: Days between Application Date and Closure Date

