



Microsoft Cloud for Financial Services in a Day

Lab 03: Customer onboarding

Step-by-Step Lab

November 2021

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Overview

Learning Objectives

In this lab, you will learn to do the following:

- Configure the Retail Banking sample Portal
- Extend the Loan Tracker application
- Embed Loan Tracker in Microsoft Teams
- Create a new loan in the Retail Banking Portal and approve the loan in Loan Tracker

Prerequisite(s)

- None

Customer onboarding

Streamline the Customer onboarding experience by offering self-service tools through mobile apps and portals and enable relationship managers to monitor the loan process. Customers can efficiently apply for and keep track of a loan by easily accessing a mobile app or portal, while the automated pipeline helps them review and validate application information. Relationship managers can monitor the loan process and ensure consistent, reliable customer experiences.

Key capabilities for Customer onboarding include the following:

- Enables customers to efficiently apply for and keep track of a loan.
- Empowers loan officers to manage loan applications with workflow automation.
- Streamlines customer operations with low- and pro-code development tools to meet specific lending needs.

Loan Tracking Application

As part of Microsoft Cloud for Financial Services, Dynamics 365 provides a loan tracker application. This application helps the loan manager manage, verify, and track the loan application.

The loan tracker application contains the relevant information for the loan application, including information about the loan amount, the loan duration, the interest rate, and personal and financial details.

Key capabilities for Loan Tracker include the following:

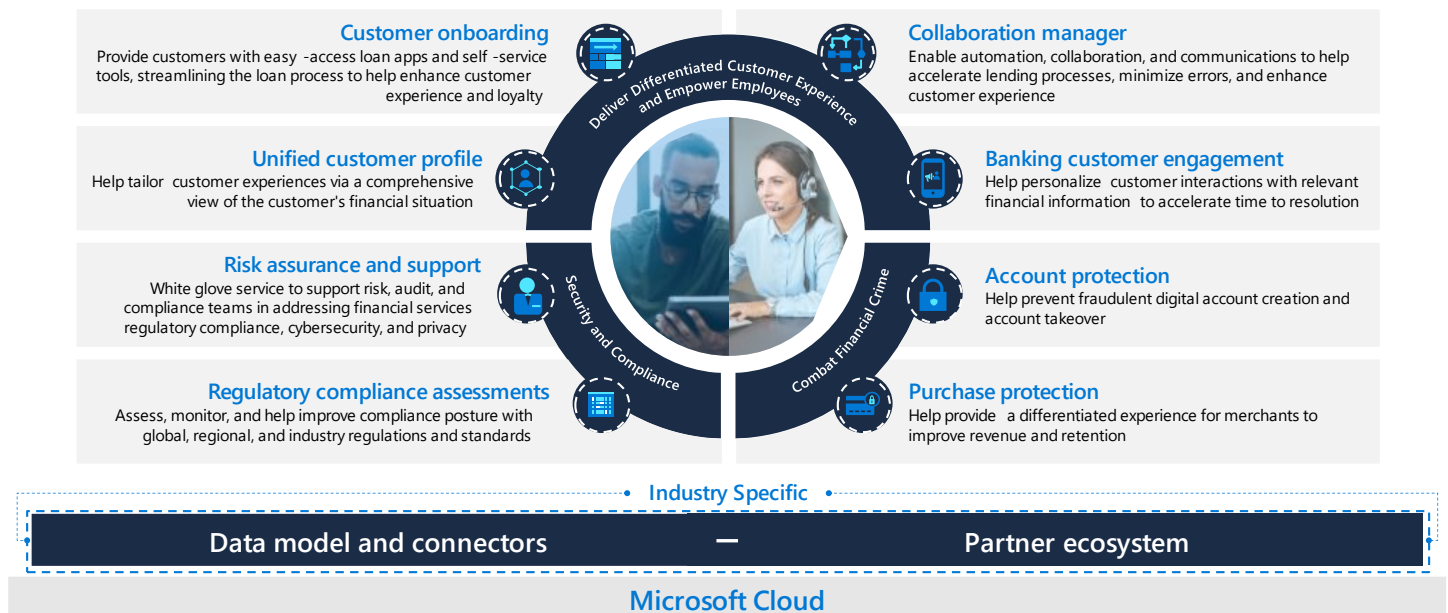
- **Application Queue:** Display loan applications that are submitted by applicants and show an applicant's stage in the queue: Loan application, Processing, Closure.

- **Business Process Flow:** Describes the application status and allows only the loan manager to progress the loan application from the verification stage to the processing stage.
- **Application Snapshot:** A snapshot for the loan manager that presents a summary of the loan application, including "to do" issues that are related to missing information.
- **Personal and Financial Information:** All relevant information that is related to the applicant, including personal details like first name, last name, address, and email. Financial details include details about the loan and applicant assets and liabilities, collateral, and employment status.
- **Document Management:** An ability to view and manage documents, including approved or rejected documents. Relevant documents for each type of loan can be required.

Industry Prioritized Scenarios

Customer onboarding focuses on the **Deliver Differentiated Customer Experience and Empower Employees** scenario of Microsoft Cloud for Financial Services.

Microsoft Cloud for Financial Services Capabilities for Retail Banking



Exercise 1: Configure Retail Banking Portal

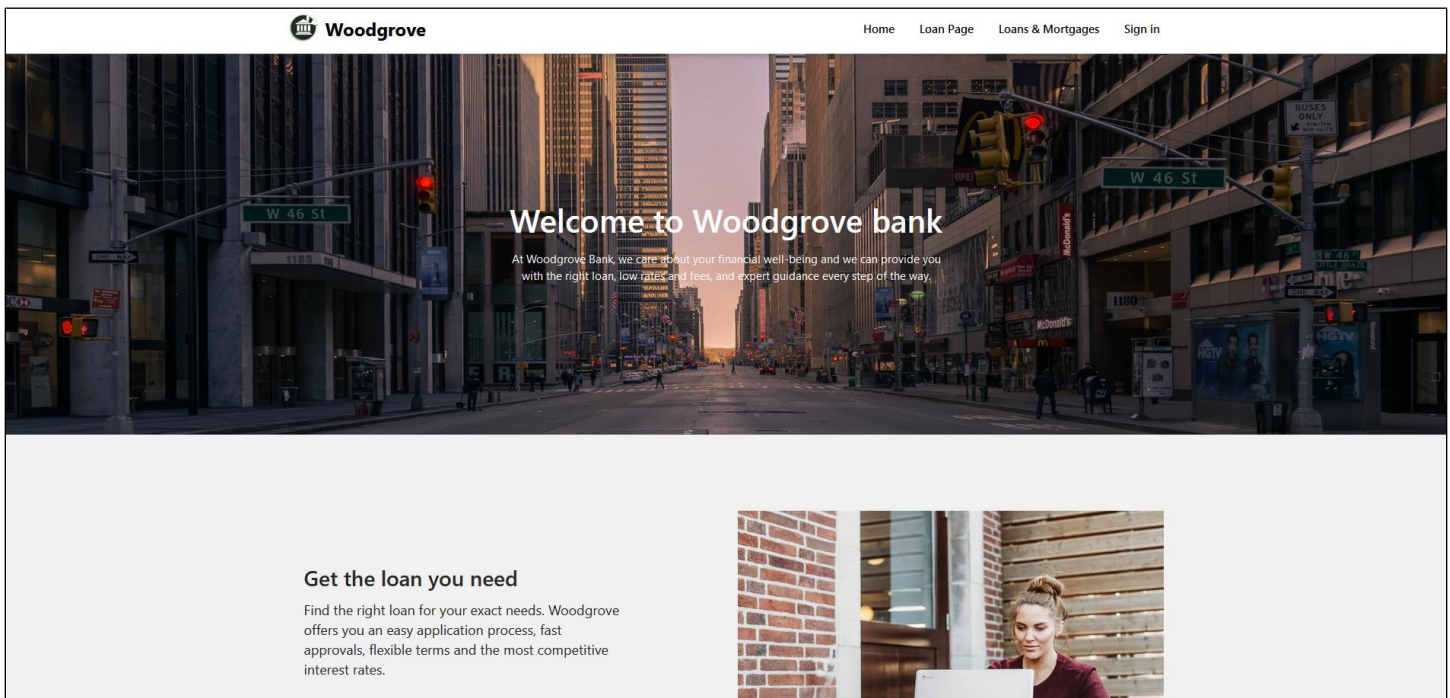
In this exercise, you will learn how to do the following:

1. Configure an external website to the Retail Banking Portal template
2. Create a registration code and invite a client to create an account for the website
3. Log in as a loan applicant to navigate the features of the retail banking website

The **Retail Banking Portal** is a template installed in your environment by the Customer onboarding module in Microsoft Cloud Solution Center when Microsoft Cloud for Financial Services was deployed.

A **Portal** is an external website that allows for communication between a company and its users. In this case, Woodgrove Bank wants an external website for their clients to access their loan history and communicate effectively with the institution. The Retail Banking Portal template tailors the website's user interface for a financial services company focusing on secure communication, information access, and an overall improved customer experience.

Here's what you should see after configuring and opening the Retail Banking Portal:



If you'd like to learn more about portals, check out Microsoft Docs: [What is Power Apps portals?](#)

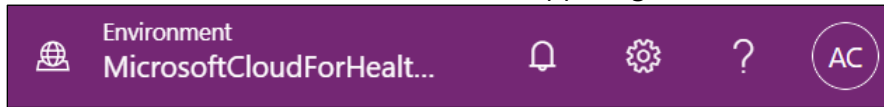
Task 1: Configure the Retail Banking Portal

Prior to deploying Microsoft Cloud for Financial Services, we created a portal in your environment using the **Customer Self-Service** template. This was a prerequisite to install the Retail Banking Portal as part of the Customer onboarding module.

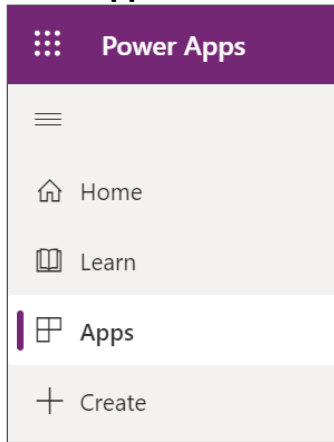
Woodgrove Bank wants to associate the previously installed Customer Self-Service portal with the **Retail Banking Portal** template, so the correct website is displayed to the user. The following steps will guide you through how to bind your website to the proper template and restart the portal for changes to apply.

We will first open the Portal to show the Customer Self-Service template currently bound. After the configuration steps in this task, you will see the new Retail Banking Portal user interface.

1. Using an In-Private or Incognito window, navigate to [Power Apps](#).
2. Select the correct environment from the upper right **Environment** drop down.



3. Select **Apps** on the left navigation bar.



4. Find the **Retail Banking Portal**, click **More Commands**, and then click **Settings**

A screenshot of the Power Apps "Apps" list. The list shows a table of applications with columns for "Name" and "Modified". The first application is "Woodgrove Banking Portal", which is highlighted. Below it are "Customer Service Hub", "Collaboration Manager for Loans", "Portal Management", "Loan Tracker", and "Unified Customer Profile".

Apps	
Component libraries (preview)	
Name	Modified
Woodgrove Banking Portal	... 1 h ago
Customer Service Hub	... 16 h ago
Collaboration Manager for Loans	... 6 d ago
Portal Management	... 1 wk ago
Loan Tracker	... 1 wk ago
Unified Customer Profile	... 1 wk ago

5. Click **Administration**

Portal settings

×

Name *

Contoso Banking Portal

Address *

https://contosobankportal.powerappsport ...

Language

English

Advanced options

🔑

Authentication settings

Configure authentication settings and manage identity providers for your portal.

Authentication settings

🔑

Administration

See additional details and perform advanced portal actions e.g. Update website address or provide a custom domain name. [Learn more](#)

Administration ↗

⚙️

Site settings

Save

Cancel

- Scroll down to **Update Portal Binding** and change the website record from Customer self-service to **Retail Banking Sample Portal**. Click **Update**.

Update Portal Binding

Select Website Record *

Retail Banking Sample Portal

Change Portal State

Portal State *

On

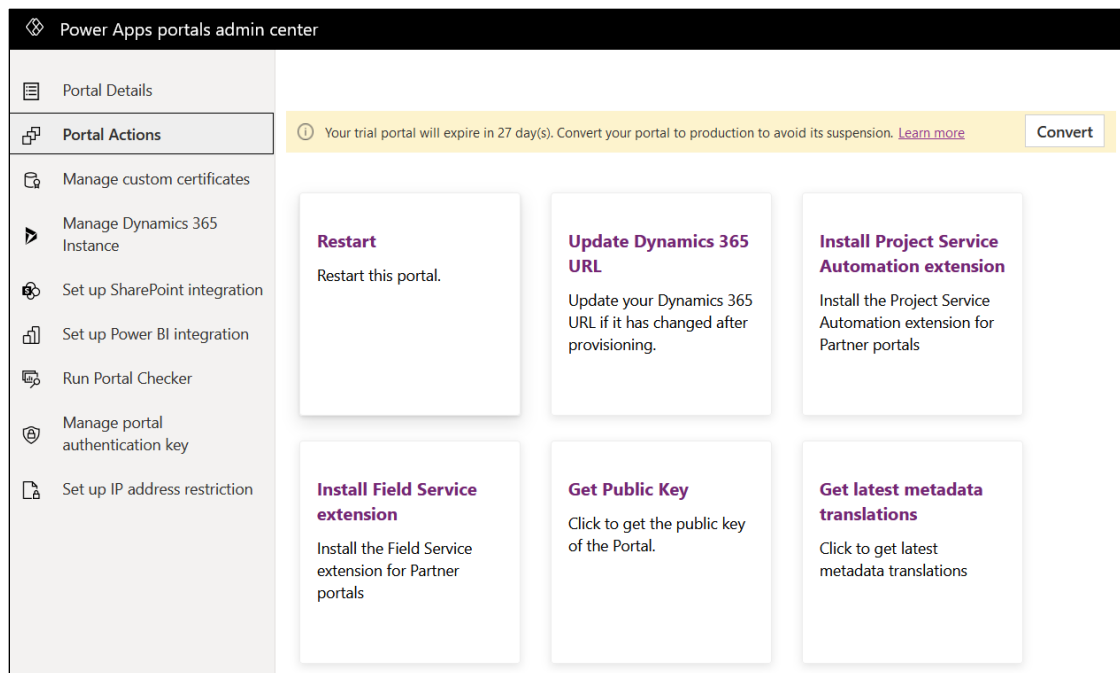
☐ Enable portal for early upgrade

If you are a Global Administrator, click [here](#) to provide consent to your Dynamics 365 portals.

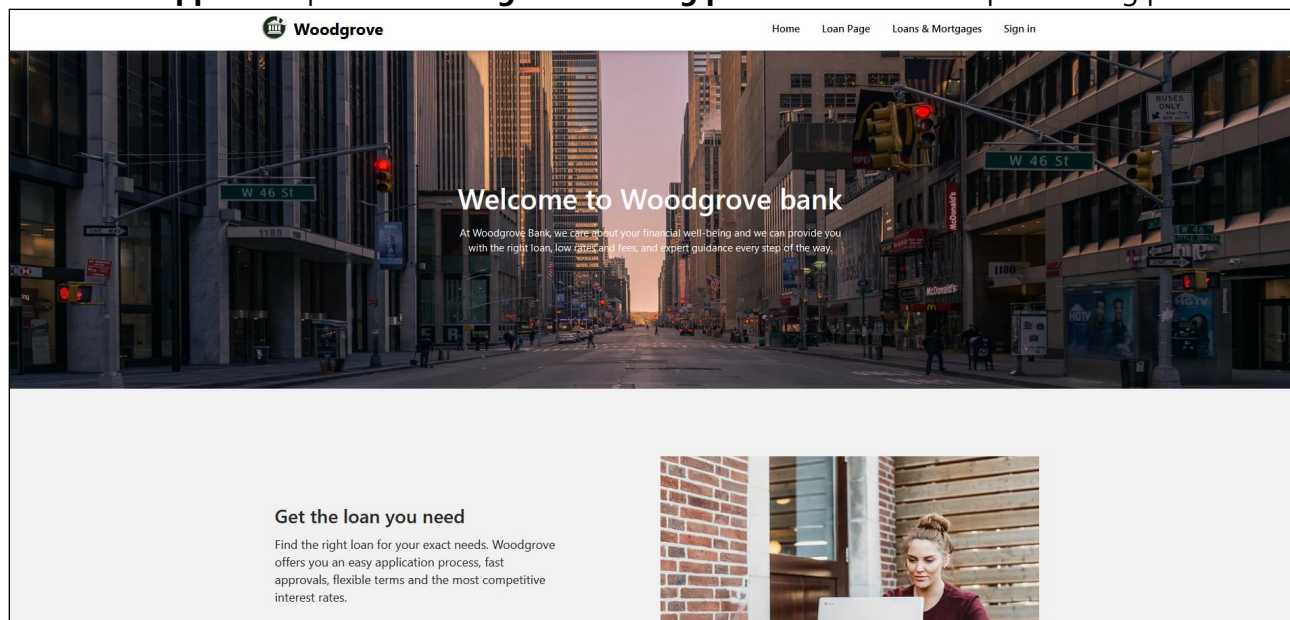
Update

- Go to **Portal Actions** on the left menu and click **Restart** to restart the portal.

7



8. Go back to **Apps** and open the **Woodgrove Banking portal** to see the sample banking portal.

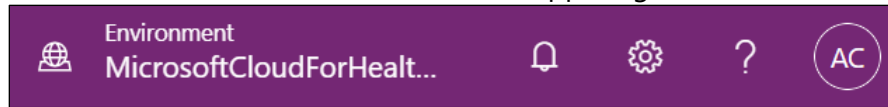


Congratulations! You have configured the Retail Banking Sample Portal in Microsoft Cloud for Financial Services.

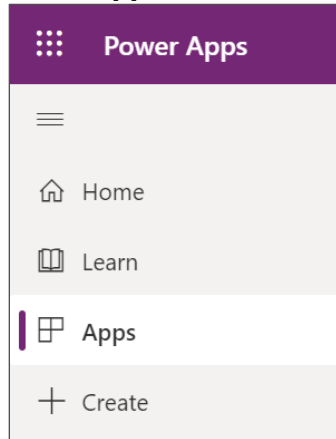
Task 2: Create a new customer

Now that you have configured the Retail Banking Sample Portal, we will create an invitation for one of the Contacts in the system so that we can access the portal as a customer.

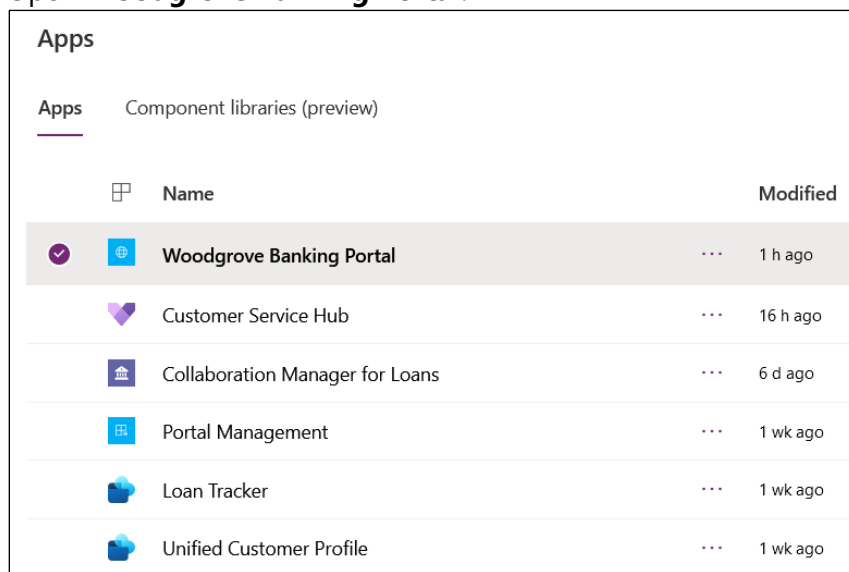
1. Using an In-Private or Incognito window, navigate to [Power Apps](#).
2. Select the correct environment from the upper right **Environment** drop down.



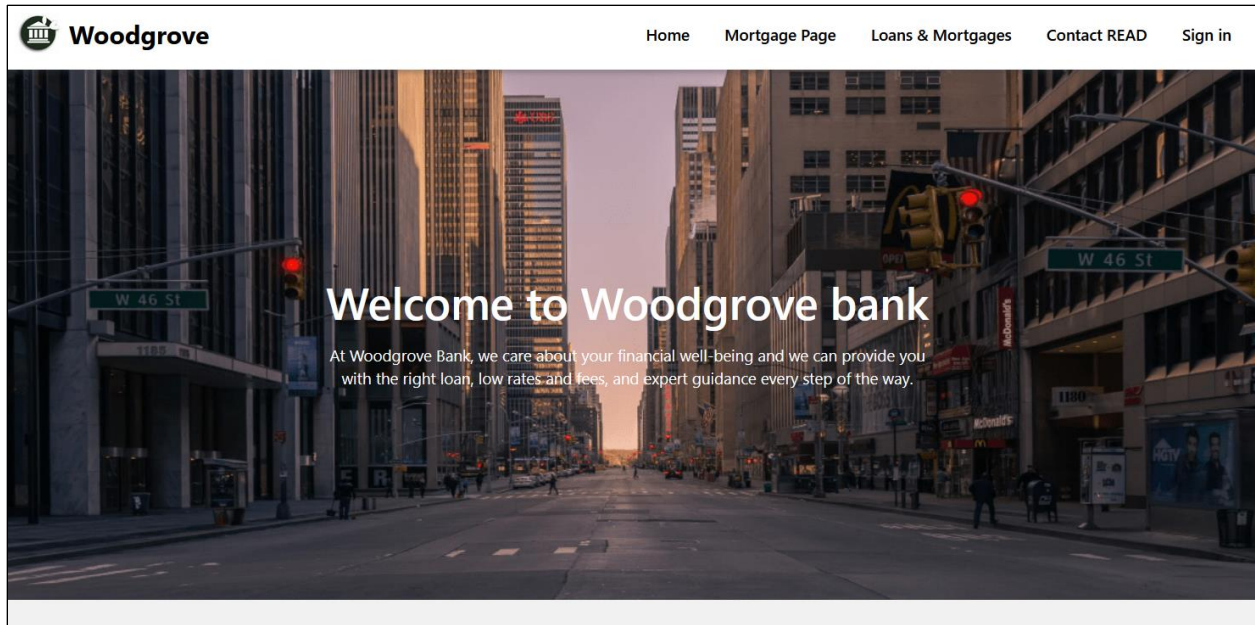
3. Select **Apps** on the left navigation bar.



4. Open **Woodgrove Banking Portal**.



5. Click Sign in on the top right



6. Click **Register** and then fill in the following information and then click **Register**:
 - a. **Email**: AllenContoso@example.com
 - b. **Username**: AllenContoso
 - c. **Password**: AllenContoso123
 - d. **Confirm Password**: AllenContoso123

The image shows the registration form on the Woodgrove Bank website. The navigation bar is the same as in the previous image. Below the navigation bar, there are two buttons: 'Sign in' and 'Register'. The 'Register' button is highlighted. Below the buttons, the text 'Register for a new local account' is displayed. The form contains four input fields, each with a red asterisk indicating a required field:

- * Email**: AllenContoso@example.com
- * Username**: AllenContoso
- * Password**: A field filled with dots.
- * Confirm password**: A field filled with dots.

 Below the input fields is a blue 'Register' button.

7. Fill in the following information and then scroll down and click Update:
 - a. **First Name**: Allen
 - b. **Last Name**: Contoso

Profile




Profile name

Personal Page

Profile

Onboarding Wizard

 Security

Change Password

Your Information

First Name *

Allen

Last Name *

Contoso

E-mail

AllenContoso@example.com

Business Phone

Provide a telephone number

Organization Name

Title

Nickname

Web Site

E-mail

AllenContoso@example.com

Business Phone

Provide a telephone number

Organization Name

Title

Nickname

Web Site

Public Profile Copy

Preferred Language

Update

Congratulations! You have successfully created a customer profile in the Retail Banking Sample Portal.

Exercise 2: Extend Loan Tracker

In this exercise, you will learn how to do the following:

1. Create a new Power Apps solution
2. Create a new Business Process Flow for tracking loans in Loan Tracker
3. Publish the Business Process Flow to Loan Tracker

The **business process flow (BPF)** presents the current application stage. This feature allows the loan manager to see the application's current stage in the process. The bank can choose to set as many stages as needed.

When the Loan Tracker application is installed, the business process flow contains four stages:

- Loan verification
- Loan Processing
- Underwriting
- Closure

In this exercise, you will extend the business process flow for loans to include a new **Quality Check** stage.

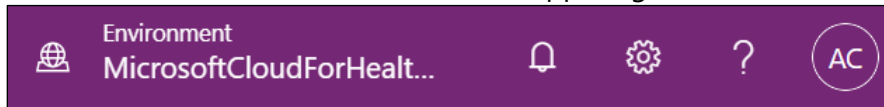
The screenshot displays the Microsoft Dynamics 365 interface for the Loan Tracker application. The top navigation bar shows 'Dynamics 365' and 'App name'. The main content area is divided into several sections:

- Loan application progress:** A horizontal bar at the top shows the stages: Loan application, Loan verification (highlighted with a red box), Loan processing, Underwriting, and Closure. The current stage is 'Loan verification'.
- Application snapshot:** A section on the left showing loan details for application #770123, including the principal amount (12,000 USD), loan term (24 Months), application date (May 5, 2021), and interest rate (4%).
- Primary applicant:** A section on the right showing the details of the primary applicant, Monica Thomson, including her contact information and status (Approved).
- Declared assets and liabilities:** A section on the right showing a bar chart comparing total assets (113,090) and total liabilities (78,100) for all parties.

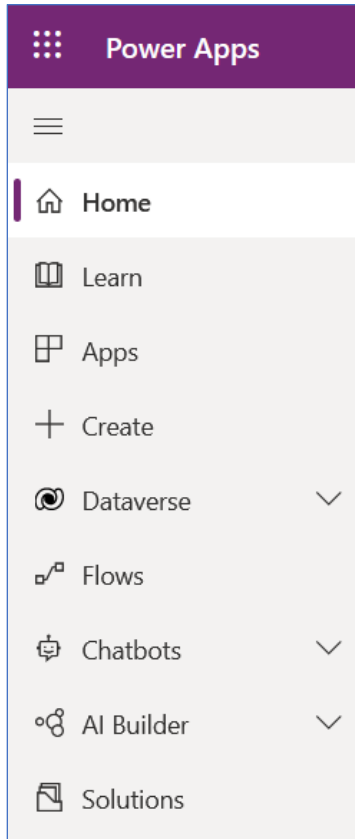
The left sidebar contains a list of loan applications, with the current application #770123 selected. The list includes columns for loan ID, status, and applicant name.

Task 1: Create a new Power Apps solution

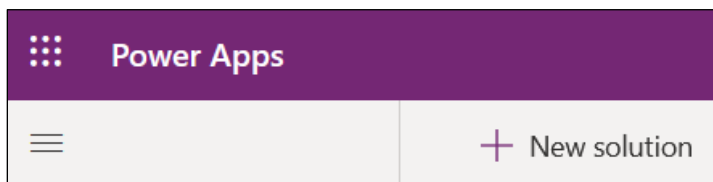
1. Using an In-Private or Incognito window, navigate to [Power Apps](#).
2. Select the correct environment from the upper right **Environment** drop down.



3. Select **Solutions** on the left navigation bar



4. Click **+ New solution**



5. Name the new solution **Woodgrove Banking**, select the **CDS Default Publisher** and click **Create**

New solution

×

Display name *

Woodgrove Banking

Name *

WoodgroveBanking

Publisher *

CDS Default Publisher (Crf76c0) ▾

✎

+ New publisher

Version *

1.0.0.0

More options ▾

Create

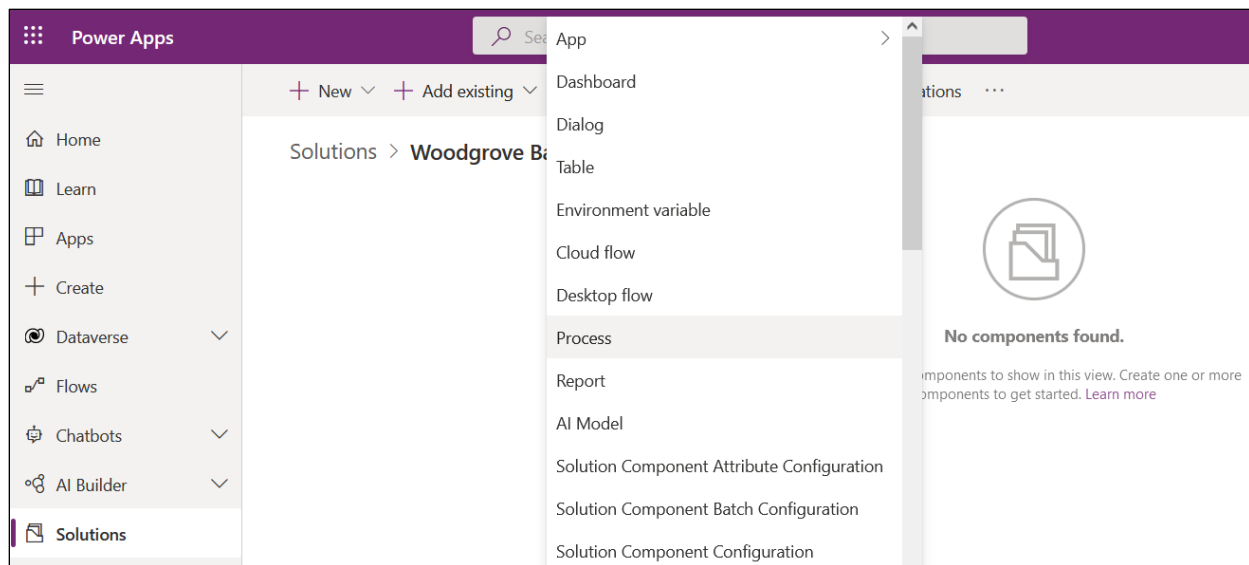
Cancel

Task 2: Extend the Loan Application Business Process Flow

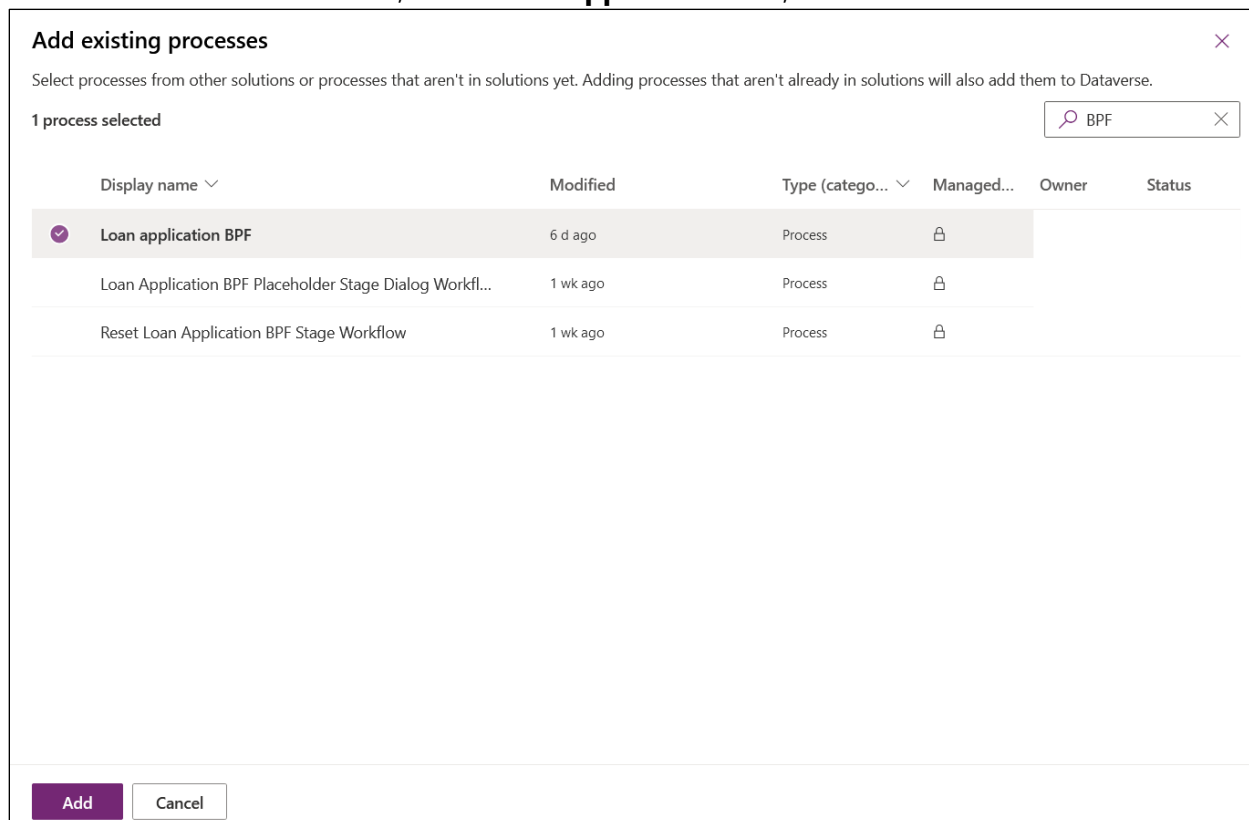
1. Click **Woodgrove Banking** to open the solution

Solutions		
Display name		Name
Woodgrove Banking	⋮	WoodgroveBanking

2. Click **+ Add existing** and then choose **Process**



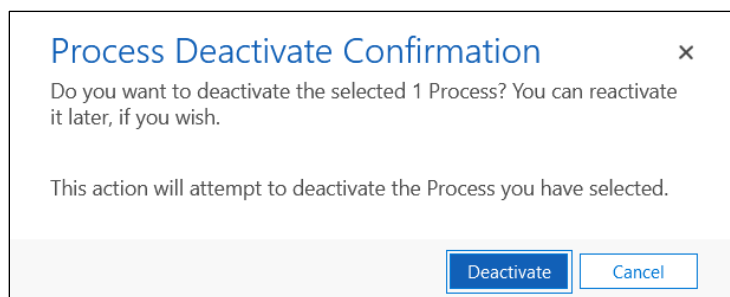
3. Search for "BPF" in search box, select **Loan application BPF**, and click **Add**



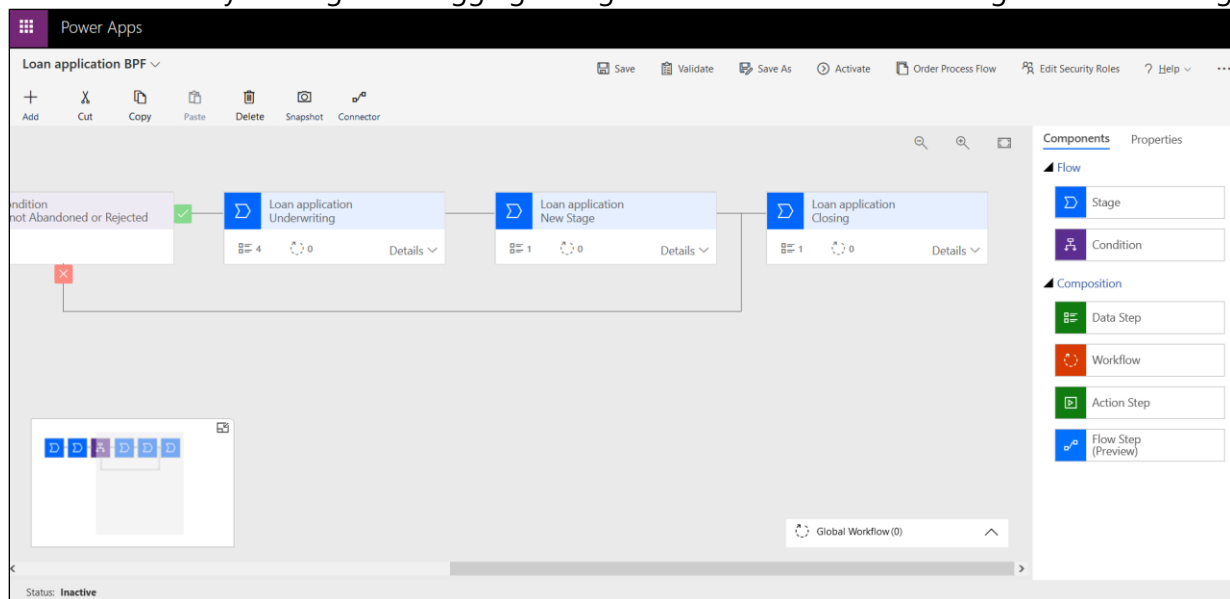
4. Open the **Loan application BPF**

Solutions > Woodgrove Banking		
Display name ▾	Name	Type ▾
✓ Loan application BPF	... Loan application BPF	Process
Loan application BPF	... msfsi_loanapplicationbpf	Table

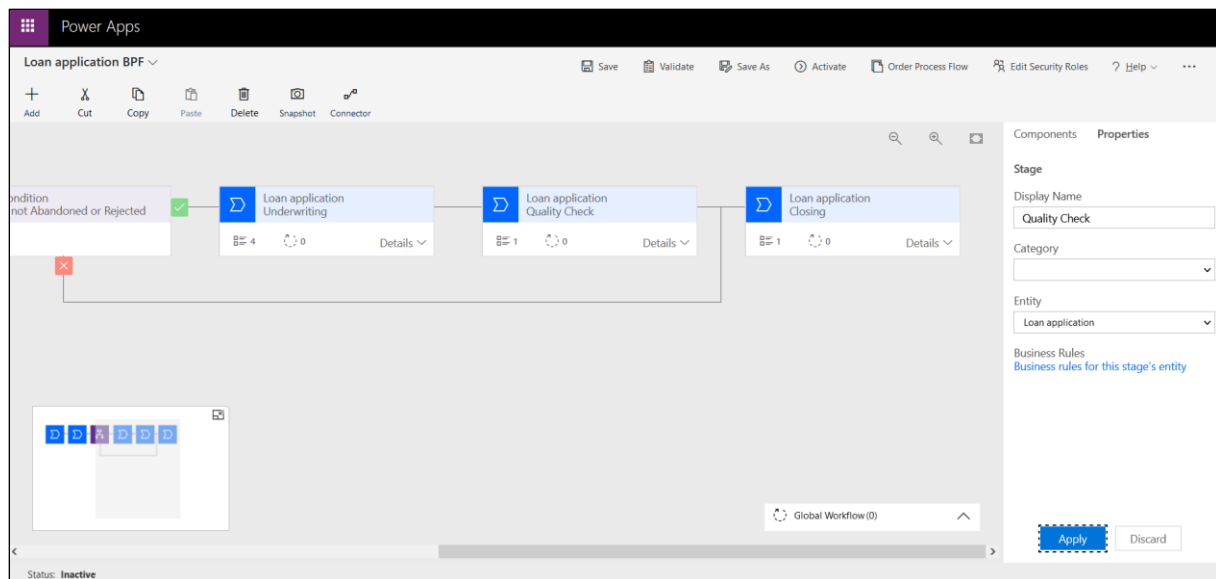
5. Deactivate the BPF



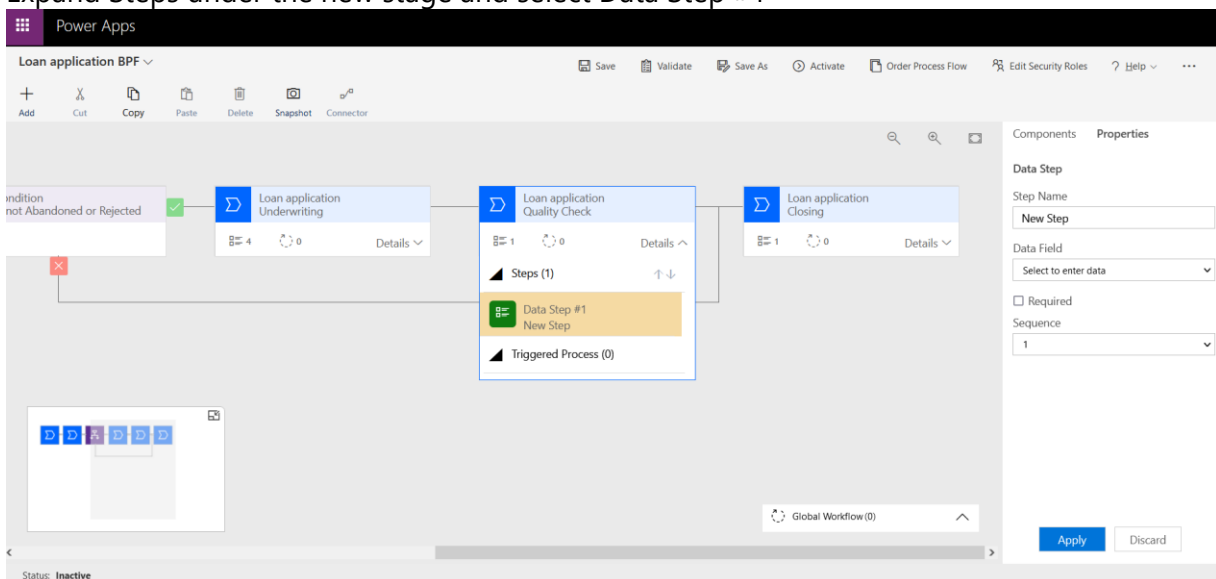
6. Extend the BPF by clicking and dragging a Stage in between the Underwriting and Closure stages



7. Select the New Stage, give it a Display Name of Quality Check and click Apply

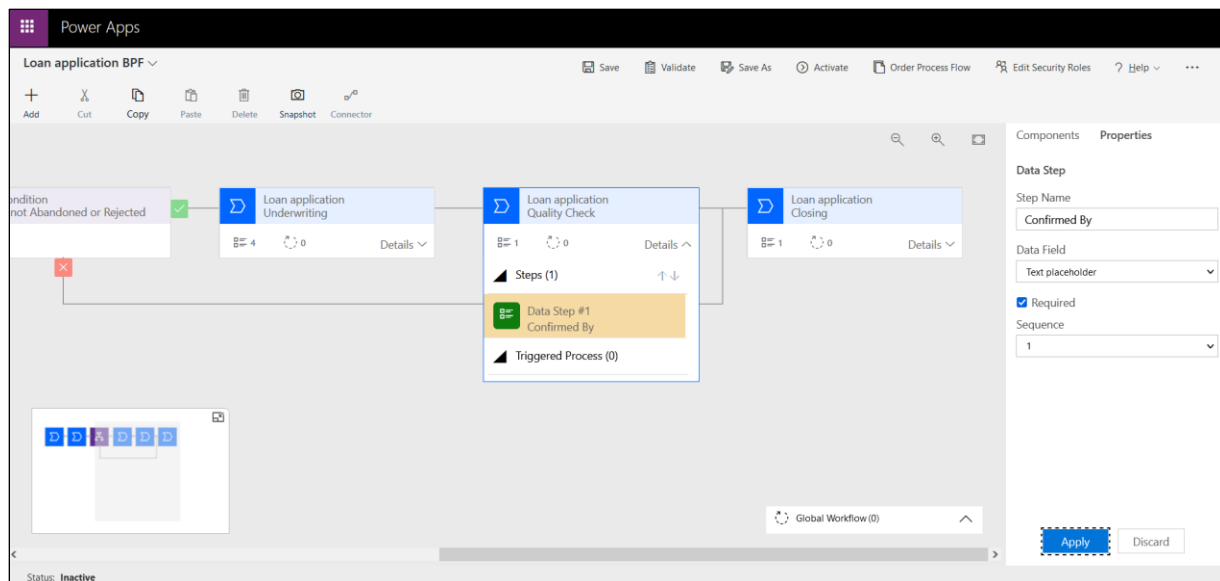


8. Expand Steps under the new stage and select Data Step #1



9. Enter the following information and click **Apply**:

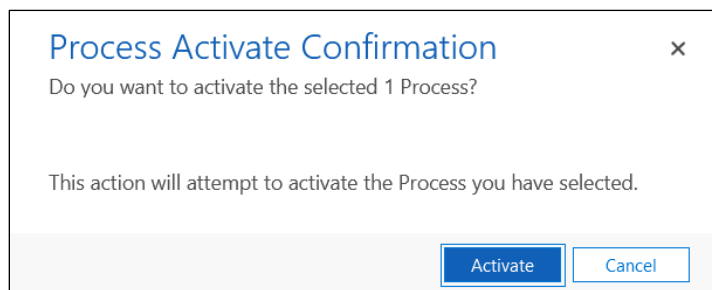
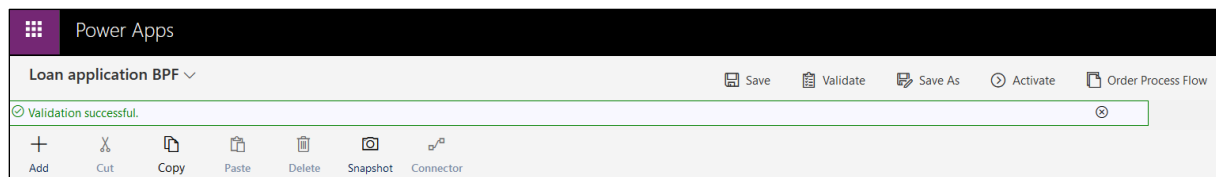
- Step Name:** Confirmed By
- Data Field:** Text placeholder
- Required:** Yes



10. Click **Save** to save your changes



11. Click Activate to activate the BPF



Congratulations! You have extended the Loan application BPF by adding an additional stage for loan applications in Microsoft Cloud for Financial Services.

Exercise 3: Embed Loan Tracker in Microsoft Teams

In this exercise, you will configure integration with Microsoft Teams for [BANK]. Microsoft Teams offers several features useful for banks and other financial institutions. By integrating Microsoft Cloud for Financial Services with Microsoft Teams, you can improve the collaboration between your staff and enhance customer service.

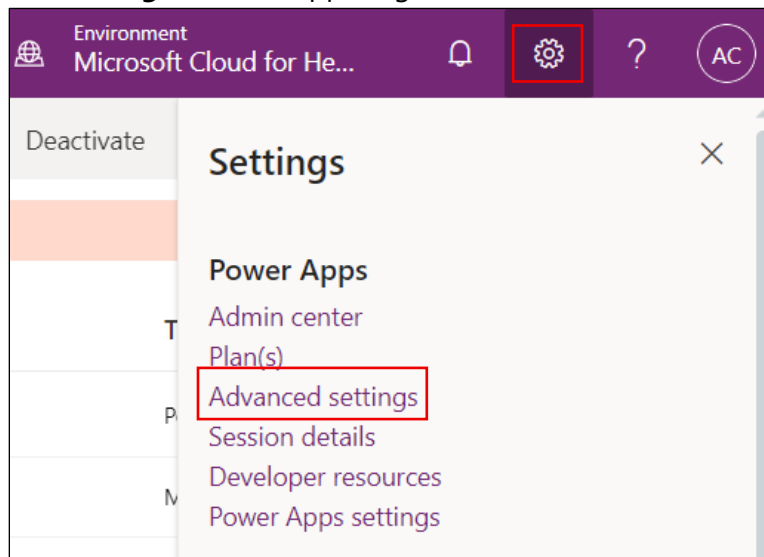
Additionally, your care team can use Microsoft Teams internally to do the following:

- Chat, call, post messages, and communicate as a team.
- Store and share files and documents to collaborate.
- Use Shifts to create, manage, and share schedules among your staff.

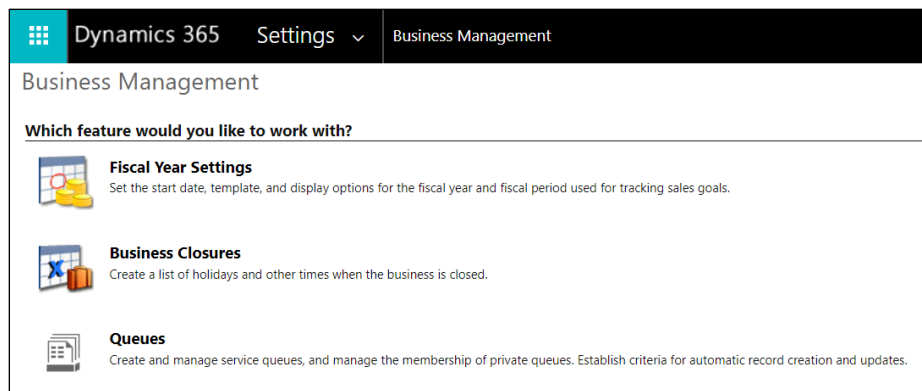
Task 1: Install and Set up Microsoft Teams Integration

By default, the Basic and Enhanced Microsoft Teams integration is disabled for customer engagement apps in Dynamics 365. In this Task, we will enable Microsoft Teams in Dynamics 365.

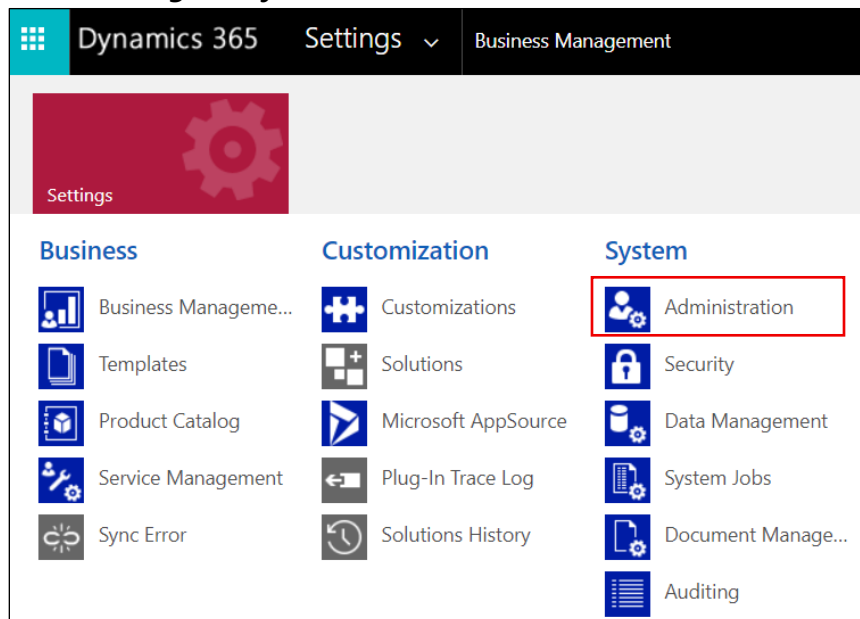
1. Go to make.powerapps.com.
2. Select the **gear** in the upper right-hand corner and then select **Advanced Settings**.



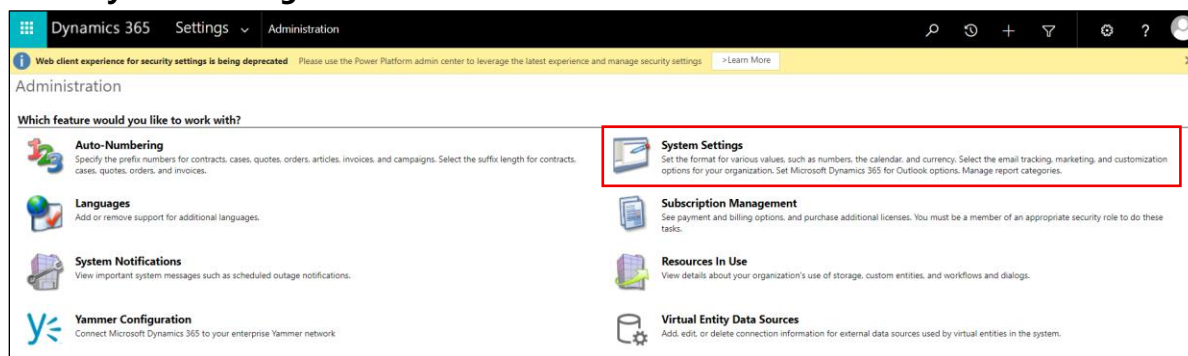
3. You will be landed in Dynamics 365 Business Management section.



4. Go to **Settings** → **System** → **Administration**.



5. Select **System Settings**.



6. Under **Microsoft Teams Integration**, switch Enable **Basic** Microsoft Teams Integration over to **Yes**.

System Settings
Set system-level settings for Microsoft Dynamics 365.

General | Formats | Auditing | Email | Marketing | Customization | Reporting | Calendar | Goals | Sales | Service | Synchronization | Mobile Client | Previews

Allow text wrapping in form fields labels and values ☒ Yes ☐ No

Select the default save option for forms
Enable auto save on all forms ☒ Yes ☐ No

Microsoft Teams Integration

Enable Basic Microsoft Teams Integration (requires system admin permissions) ☐ Yes ☒ No

Enable Enhanced Microsoft Teams integration (requires tenant admin permissions) ☐ Yes ☒ No

[What's the difference?](#)

Set the full-name format
Name Format: First Name Last Name

Set the currency precision that is used for pricing throughout the system
Pricing Decimal Precision: 2

Set whether reassigned records are shared with the original owner
Share reassigned records with original owner ☐ Yes ☒ No

Set blocked file extensions for attachments
ade;adp;app;asa;ashx;asmx;asp;bas;bat;cdx;cer;chm;class;cmd;com;config;cpl;crt;cs;dll;exe;fpx;hlp;hta;htm;htw;ida;idc;idq;inf;ins;isp;its;jar;js;se;skh;lnk;mad;maf;mag;mam;maq;mar;mas;mat;mau;mav;maw;mdb;mda;mdb;mdc;mdt;mdw;mdz;msc;msh;msh1;msh1xml;msh2;msh2xml;mshxml;msi;mst;ops;pcd;plf;prf;prq;printer;pst;req;rem;scf;scr;scst;shb;shs;shst;shstml;soap;stm;tmp;url;vbs;vbsm

OK Cancel

7. When the pop-up opens, click **OK**. This will take several minutes to configure.

Collaborate easily with Microsoft Teams

Enable Microsoft Teams collaboration to start chatting and sharing files with teammates now. [Learn More.](#)

OK Cancel

8. When it is completed, click **Finish**.

Collaborate easily with Microsoft Teams

✓

You're almost there! To activate your Microsoft Teams experience, click OK on the System Settings page below after closing this window.

Finish

9. Once back on System Settings, switch Enable **Enhanced** Microsoft Teams integration to **Yes**.

System Settings
Set system-level settings for Microsoft Dynamics 365.

General | Formats | Auditing | Email | Marketing | Customization | Reporting | Calendar | Goals | Sales | Service | Synchronization | Mobile Client | Previews

Allow text wrapping in form fields labels and values ☒ Yes ☐ No

Select the default save option for forms
Enable auto save on all forms ☒ Yes ☐ No

Microsoft Teams Integration

Enable Basic Microsoft Teams Integration (requires system admin permissions) ☒ Yes ☐ No

Enable Enhanced Microsoft Teams integration (requires tenant admin permissions) ☐ Yes ☒ No

[What's the difference?](#)

Set the full-name format
Name Format

Set the currency precision that is used for pricing throughout the system
Pricing Decimal Precision

Set whether reassigned records are shared with the original owner
Share reassigned records with original owner ☐ Yes ☒ No

Set blocked file extensions for attachments
ade;adp;app;asa;ash;cas;mxcasp;bas;bat;cdx;cer;chm;class;cmd;com;config;cpb;crf;cs;dll;exe;fpx;hlp;hta;htm;html;id;idc;idq;inf;ins;isp;its;jar;js;jsse;ksh;lnk;mad;maf;magg;man;maq;man;mas;mat;mau;mav;maw;mda;mdb;mde;mdt;mdw;mdz;msc;msh;msh1;msh1xml;msh2;msh2xml;mshxml;msi;mst;mst;ops;pcd;pdf;prf;prq;printer;pst;req;rem;scf;scr;sct;shb;shs;shtm;shxml;soap;stm;tmp;url;vby;vbe;vbs;vsm

OK Cancel

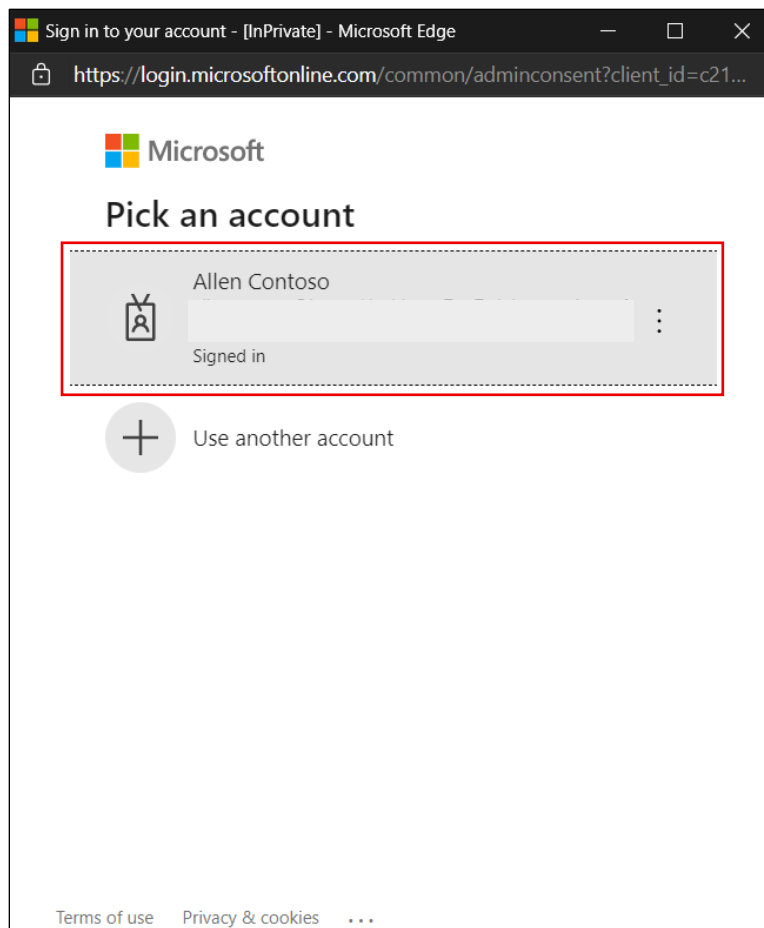
10. When the pop-up opens, click **OK**

Collaborate right from Dynamics 365

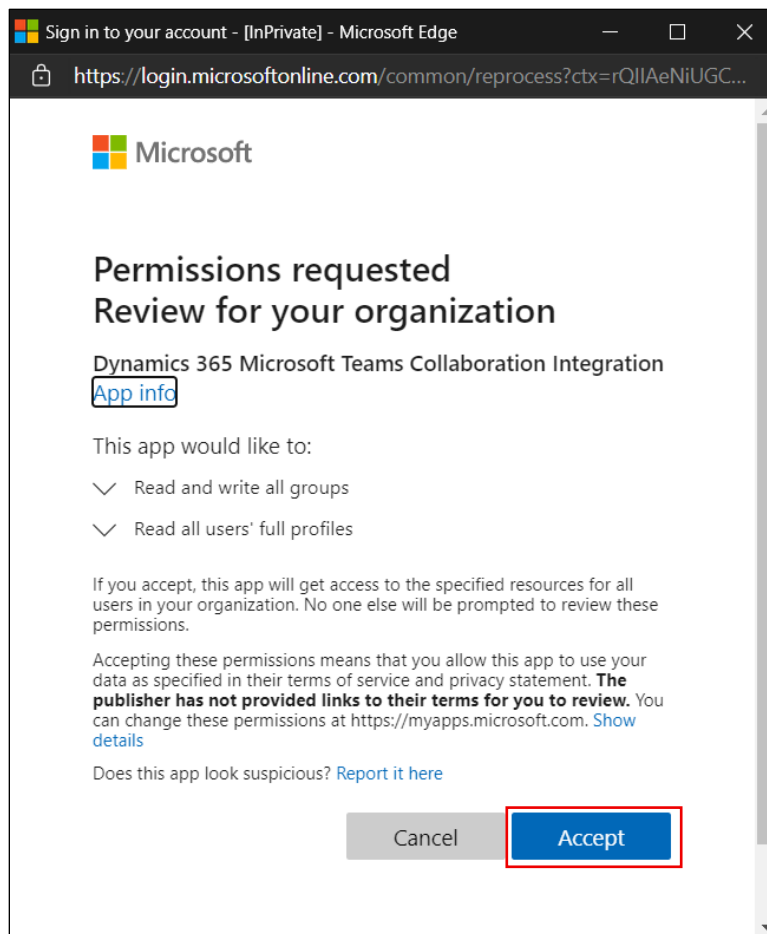
Work seamlessly with teammates—even build new connections without leaving Dynamics 365—with our enhanced Microsoft Teams experience. [Learn more](#)

OK Cancel

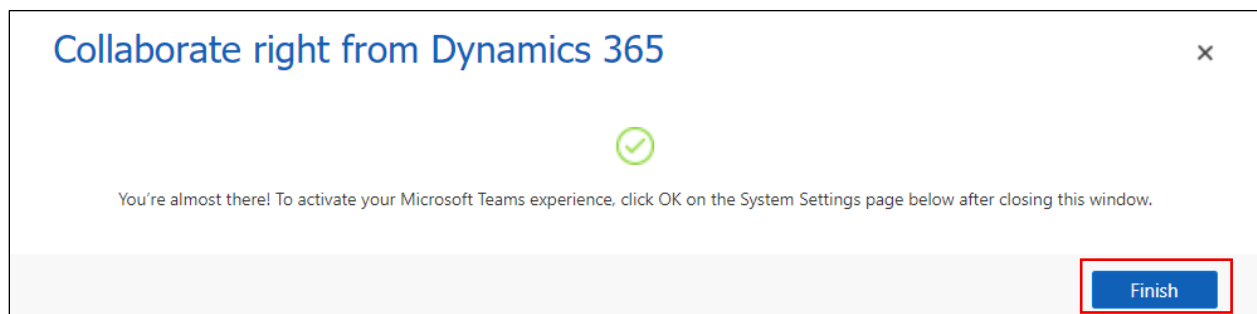
11. Another pop-up window will open. Select the user that you are signed in as currently.



12. Click **Accept**.



13. Click **Finish**.



14. You will now see that both Microsoft Teams Integration settings are set to Yes. Click **OK**.

System Settings

Set system-level settings for Microsoft Dynamics 365.

General

Formats

Auditing

Email

Marketing

Customization

Reporting

Calendar

Goals

Sales

Service

Synchronization

Mobile Client

Previews

Allow text wrapping in form fields labels and values

☒ Yes ☐ No

Select the default save option for forms

Enable auto save on all forms

☒ Yes ☐ No

Microsoft Teams Integration

Enable Basic Microsoft Teams Integration (requires system admin permissions)

☒ Yes ☐ No

Enable Enhanced Microsoft Teams integration (requires tenant admin permissions)

☒ Yes ☐ No

What's the difference?

Set the full-name format

Name Format

First Name Last Name

Set the currency precision that is used for pricing throughout the system

Pricing Decimal Precision

2

Set whether reassigned records are shared with the original owner

Share reassigned records with original owner

☐ Yes ☒ No

Set blocked file extensions for attachments

ade;adp;app;asa;ashx;asmx;asp;bas;bat;cd;ccen;chm;class;cmd;com;config;cpl;cr;cs;dll;exe;fpx;hlp;hta;htm;html;id;idc;idq;inf;ins;isp;its;jar;js;jse;ksh;lnk;mad;maf;mag;mam;maq;mar;mas;mat;mau;mav;maw;mda;mdb;mde;mdt;mdw;mdz;msc;msh;msh1;msh1xml;msh2;msh2xml;mshxml;msi;msp;mstop;pcd;pif;prf;prg;printer;pst;req;rem;scf;scr;sct;shb;shs;shtm;html;soap;stm;tmp;url;vbe;vbs;vsm

OK

Cancel

Congratulations! You have enabled Microsoft Teams integration for Dynamics 365.

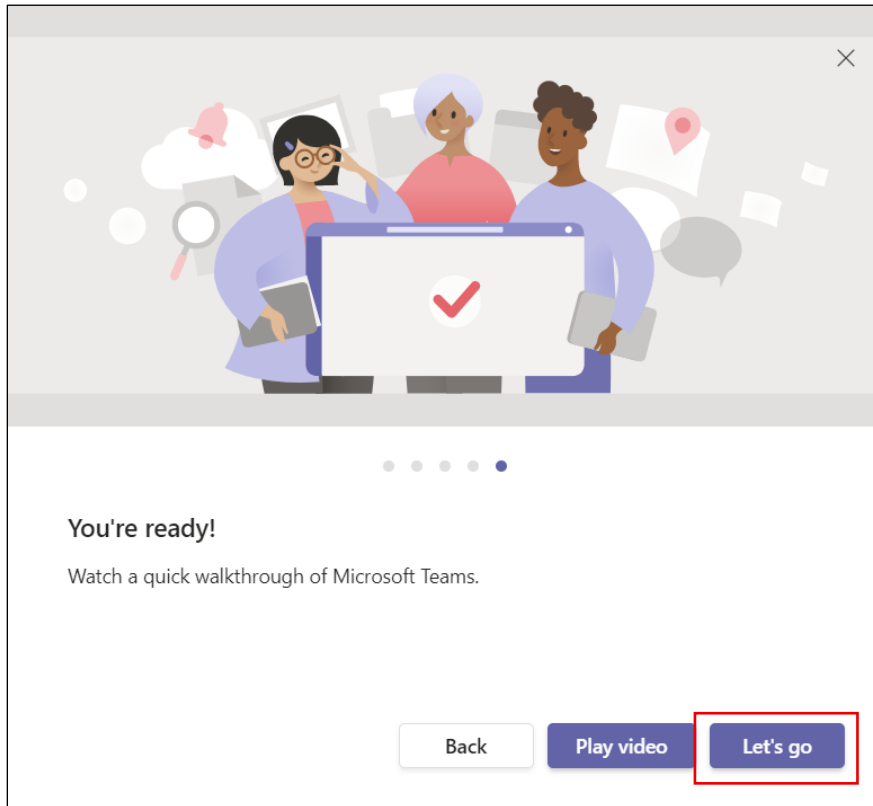
25

Task 2: Embed Virtual Clinic App in Microsoft Teams

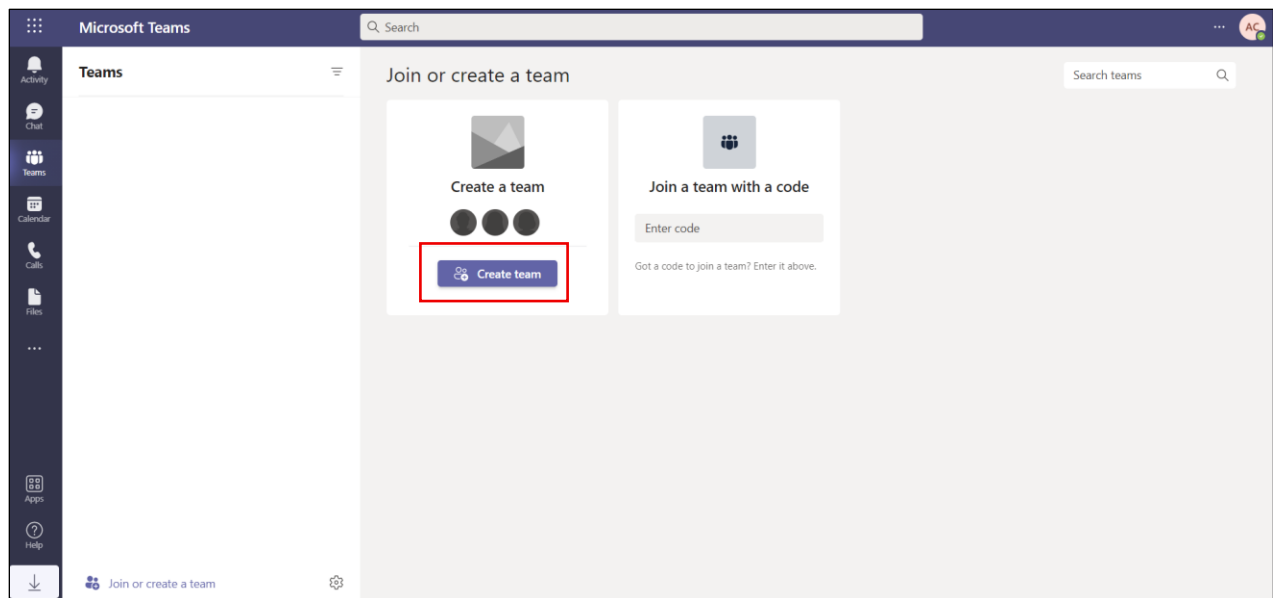
In this task, you will customize the Microsoft Teams experience for a practitioner by embedding the Virtual Clinic app to the Teams channel in your environment*.

*We will be utilizing the Microsoft Teams web experience for this task.

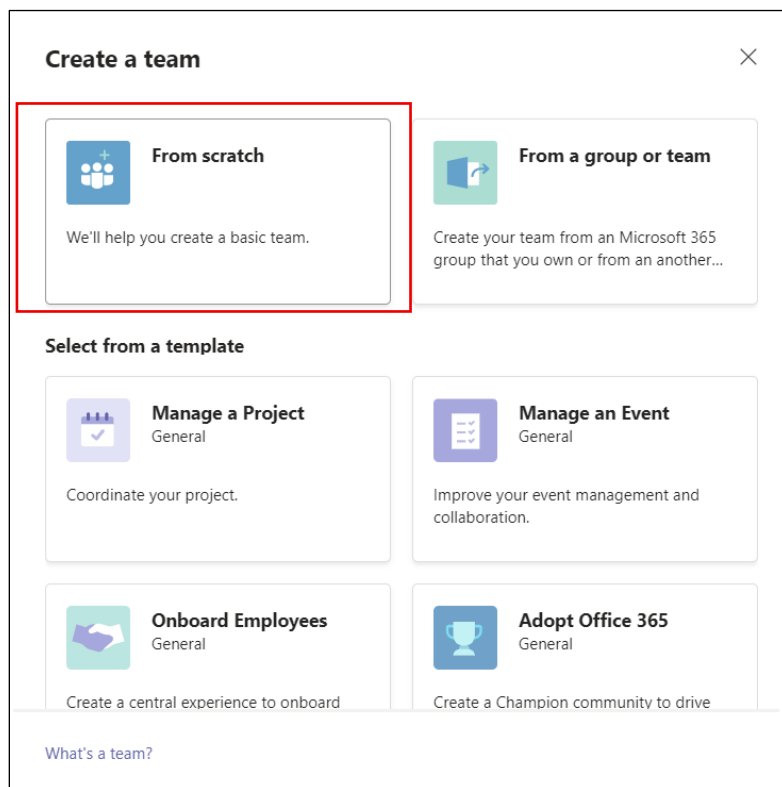
1. While logged in to your Microsoft 365 tenant, open a new tab and go to teams.microsoft.com.
2. Click **Next** through the prompts, and then click **Let's Go**.



3. Select Teams on the left navigation bar and then click **Create Team**.




4. Click **From scratch**.




5. Click Public.


What kind of team will this be?



Private
People need permission to join



Public
Anyone in your org can join



Org-wide
Everyone in your organization automatically joins

[< Back](#)

6. Call the Team “**Woodgrove Bank**” and click Create.

Some quick details about your public team

Team name

Contoso Bank

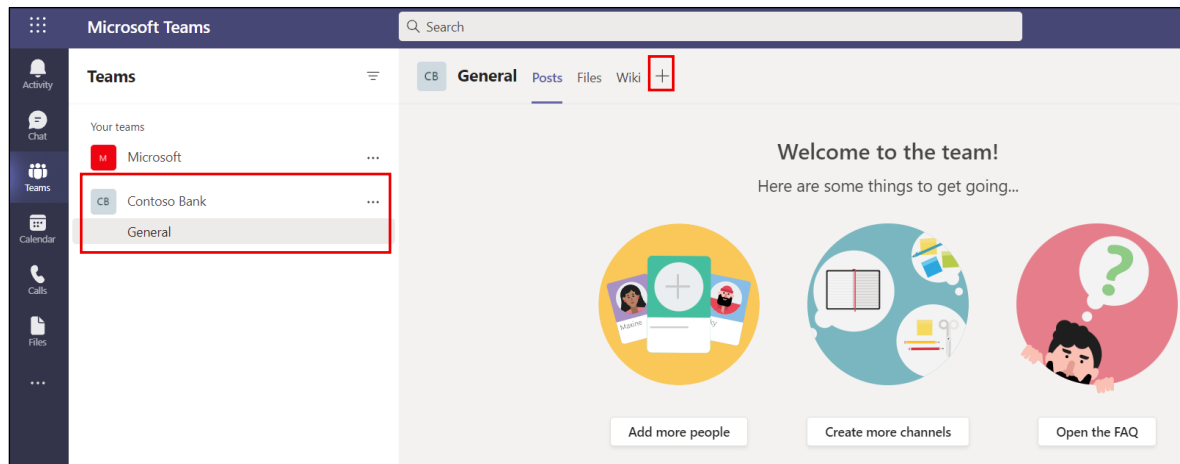
Description

Let people know what this team is all about

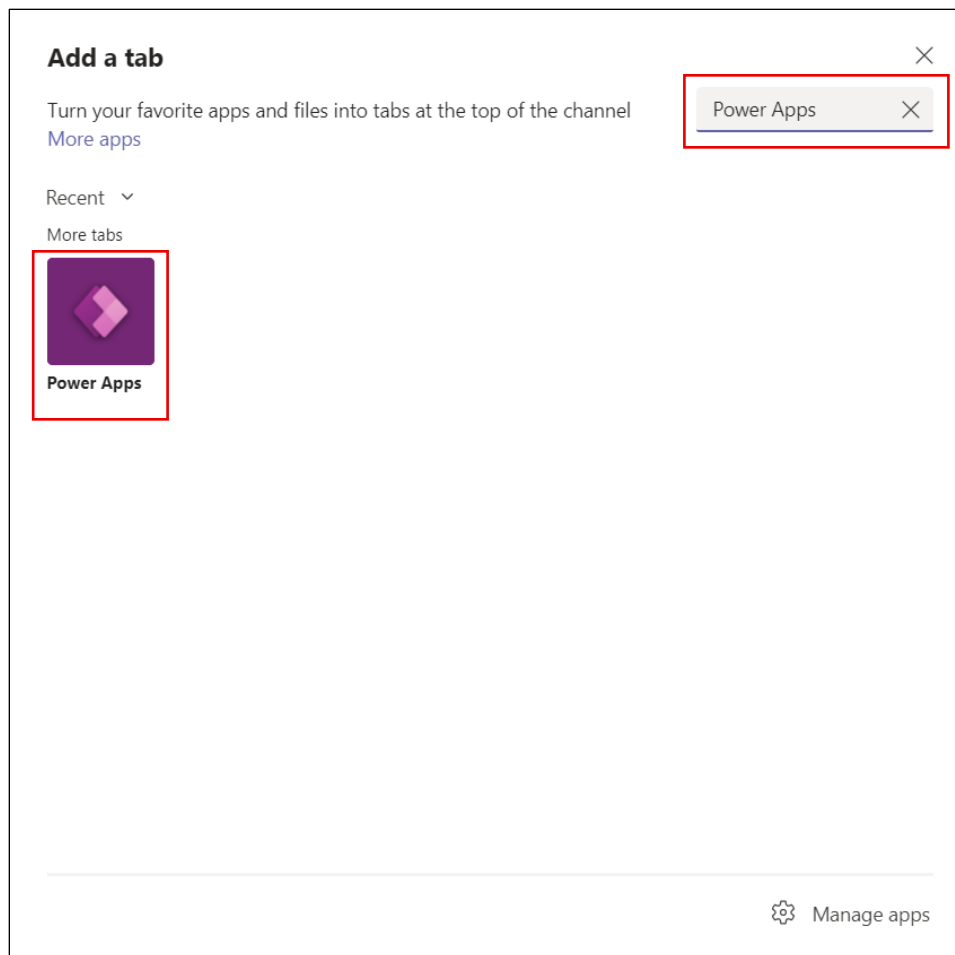
< Back

Create

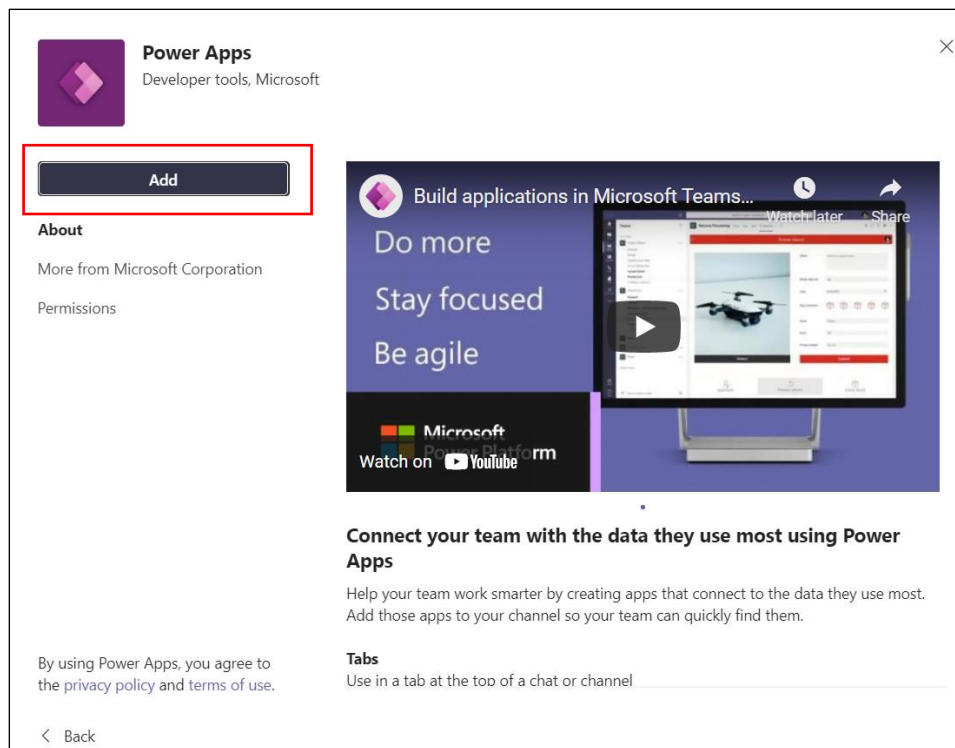
7. Once the Team is created and the **General channel** selected, click the **+** button to add a tab



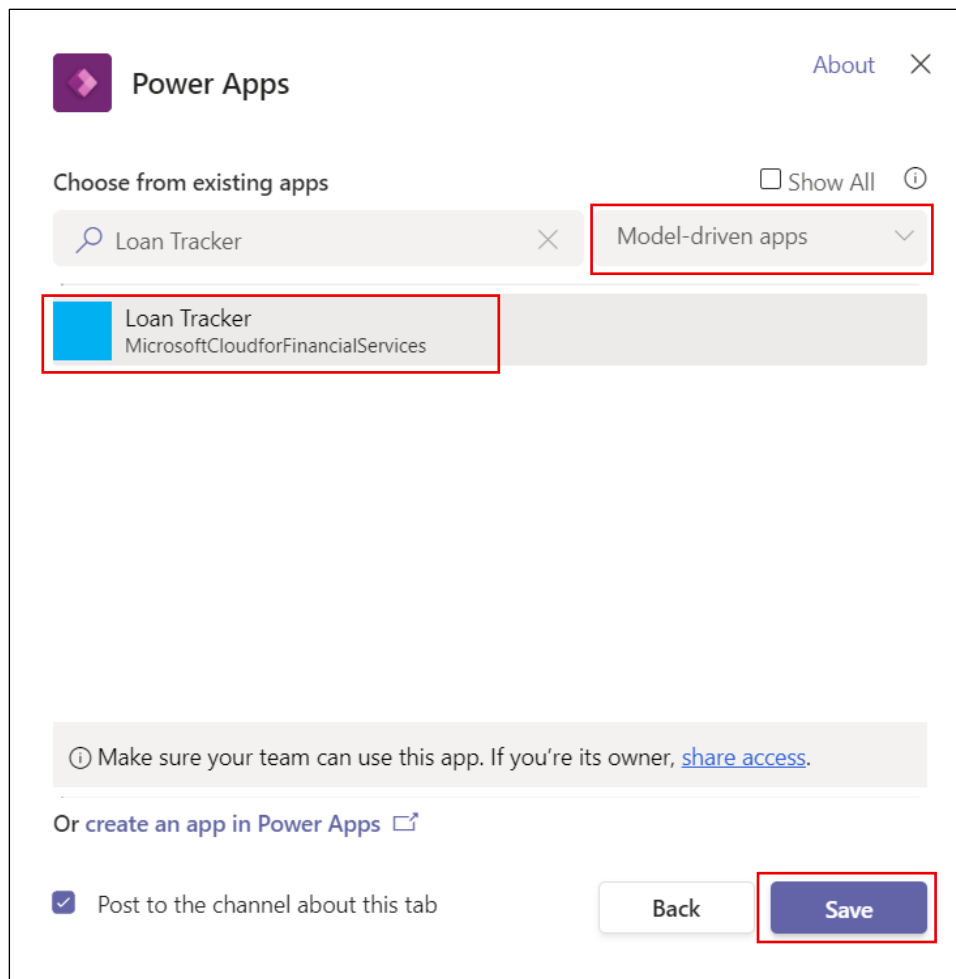
8. Search for "Power Apps" and select **Power Apps**



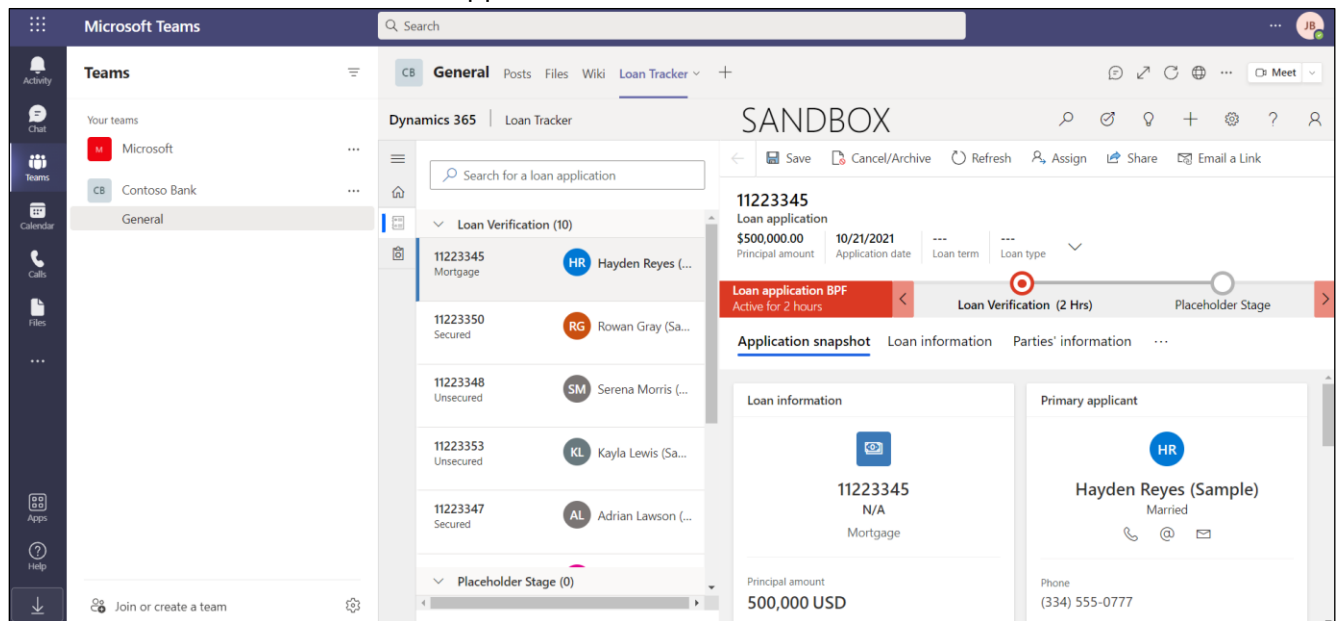
9. Click **Add**



10. Select **Model-driven apps** from the dropdown menu, then search for and select **Loan Tracker** and click **Save**.



11. You will now see the Loan Tracker app embedded in Microsoft Teams



Congratulations! You have embedded the Loan Tracker app in Microsoft Teams.

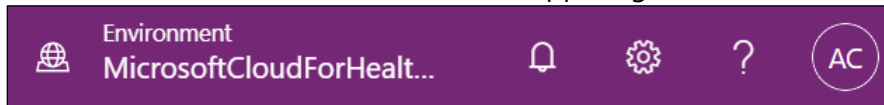
Exercise 4: Submit and approve a loan

In this exercise, you will learn how to do the following:

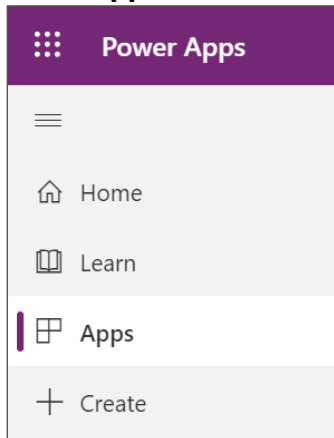
1. Log into the Retail Banking portal as a customer and submit a loan request
2. Log into Loan Tracker in Microsoft Teams as a Loan Representative and approve the loan

Task 1: Log into the Retail Banking portal as a customer and submit a loan request

1. Using an In-Private or Incognito window, navigate to [Power Apps](#).
2. Select the correct environment from the upper right **Environment** drop down.

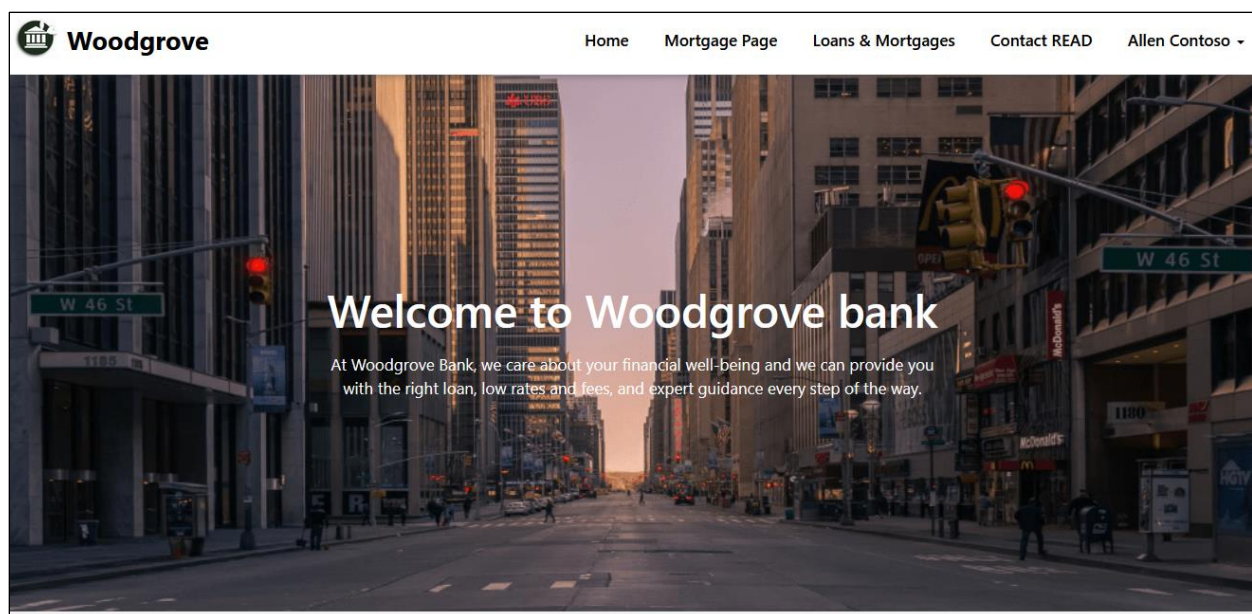


3. Select **Apps** on the left navigation bar.

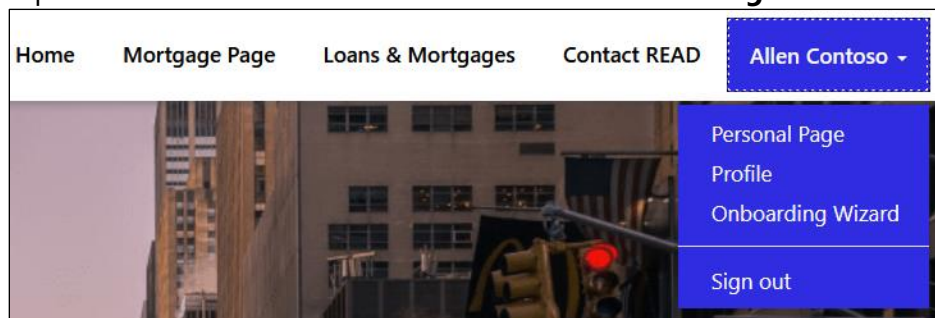


4. Open the Woodgrove Banking Portal and sign in as Allen Contoso

Apps		
Apps	Component libraries (preview)	
	Name	Modified
	Woodgrove Banking Portal	... 1 h ago
	Customer Service Hub	... 16 h ago
	Collaboration Manager for Loans	... 6 d ago
	Portal Management	... 1 wk ago
	Loan Tracker	... 1 wk ago
	Unified Customer Profile	... 1 wk ago




- Expand Allen Contoso's information and click **Onboarding Wizard** to initiate a mortgage loan request.



- Under Mortgage Details, fill out the following information and click **Next**:
 - Mortgage Purpose**: Home purchase

- b. **Loan Term:** 360
- c. **Mortgage amount required (USD):** 500,000
- d. **Down payments (USD):** 80,000

 Woodgrove

HomeMortgage PageLoans & MortgagesContact READAllen Contoso ▾

Your mortgage loan request

To evaluate your mortgage loan request accurately, we need some information about you and your financing needs.

☒ Mortgage details

☐ Your details

☐ Co-applicants

☐ Documents

☐ Summary

Tell us about the mortgage you need

Mortgage purpose *

Home purchase ▾

Mortgage amount required (USD) *

500000 ▾

Loan term *

360 ▾

Down payment (USD)

80000 ▾

Next

Cancel

7. Under Your details, fill out the following information and click **Next**:
- a. **Title:** Mr.
 - b. **First Name:** Allen
 - c. **Last Name:** Contoso
 - d. **Date of Birth:** 10/01/1980
 - e. **National Number:** 555-55-5555


Tell us about yourself

Personal details

Title

Mr. ▾

Date of Birth *

10/01/1980 

First Name *

Allen

National ID *

555-55-5555

Middle Name

Marital Status

Select marital status ▾

Last Name *

Contoso

- f. **Phone number:** (859) 555-0274
- g. **Street address 1:** 123 Main Street
- h. **Email Address:** AllenContoso@example.com
- i. **City:** Redmond
- j. **State:** WA
- k. **Country/Region:** USA
- l. **Zip/Postal Code:** 98072

Contact information	
Phone number * <input type="text" value="859 555 0274"/>	City * <input type="text" value="Redmond"/>
Email address * <input type="text" value="AllenContoso@example.com"/>	State * <input type="text" value="WA"/>
Address 1 * <input type="text" value="123 Main Street"/>	Country/Region * <input type="text" value="USA"/>
Address 2 <input type="text"/>	ZIP/Postal code * <input type="text" value="98072"/>

- m. **Employment's status:** Full time
- n. **Job Title:** Owner
- o. **Employer's name:** Contoso Industries
- p. **When did you begin working there?:** 01/01/2021
- q. **I'm currently working there:** Yes
- r. **Credit score:** 800
- s. **How many loans have you taken in the last 90 days:** 0

Tell us about your financial status

Your employment history

Employment status *

Full time



Job title *

Owner

Employer's name *

Contoso Industries

When did you begin working there? *

01/01/2021



When did you stop working there?

MM/YYYY



I'm currently working there

+ Add another employer

Credit score

800



How many loans have you taken in the last 90

0



- t. **Asset type:** Savings account
- u. **Balance or value (USD):** 250000
- v. **Asset description:** Savings

Your assets

Asset type *	Balance or value (USD) *
Savings account	250000

Asset description

Savings

 Remove

 Add another asset

Your liabilities

 Add liability

Back Next Cancel

8. Select **Sole borrower** and then click **Next**

☒ Mortgage details

☒ Your details

☐ Co-applicants

☐ Summary

Are you the sole borrower or are you applying with others?

☒ Sole borrower ☐ With other applicant/s


Back Next Cancel


9. Scroll down to the bottom of the page, **check** the certification check box and click **Submit application**

☒ I certify that the information I've provided is true to the best of my knowledge

Back Submit application Cancel

10. Click **Go to my personal page** to see the loan application status


 **Woodgrove** Home Loan Page Loans & Mortgages Amber Rodriguez (Sample) ▾



Your application is on its way!

One of our bankers will review it shortly, and we'll contact you within two days to talk about next steps. You can also track your application's progress on your personal page.

[Go to my personal page](#)


Woodgrove

[Home](#)
[Mortgage Page](#)
[Loans & Mortgages](#)
[Contact READ](#)
[Allen Contoso](#)

Hi Allen, welcome to your personal page.

Your personal details

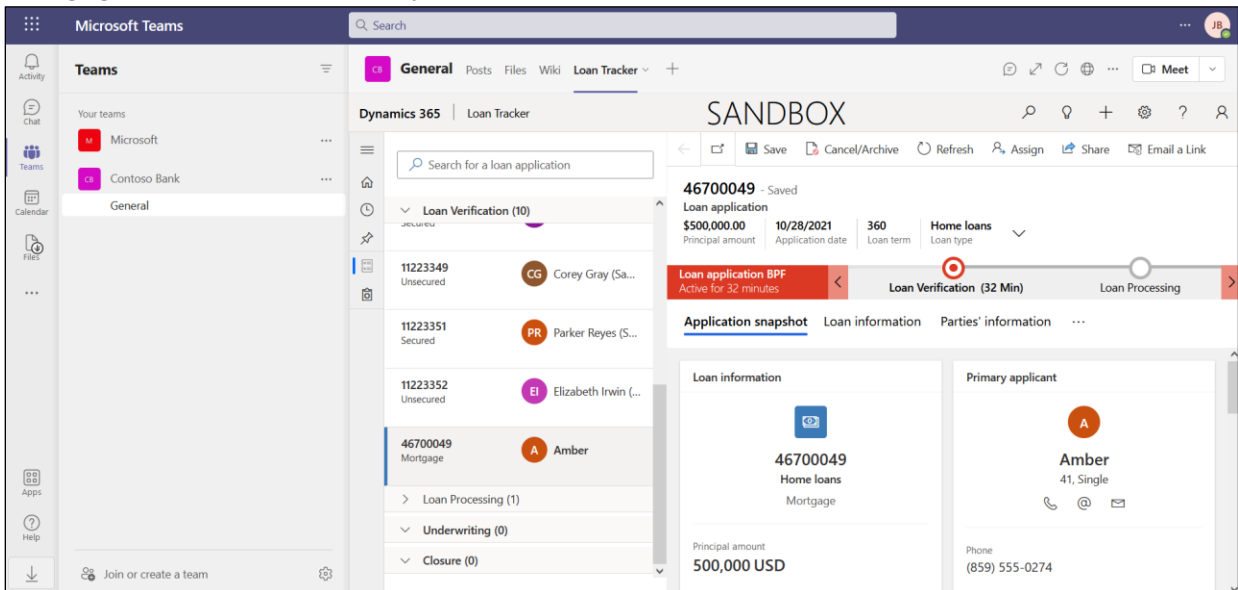
Full name Allen Contoso	National ID N/A	Phone number N/A
Email address AllenContoso@example.com	Home address N/A	

Your loan applications

Mortgage purpose	Loan number	Status	Date
Home purchase	78315778	In Review	11/09/2021 18:13:37

Task 2: Log into Loan Tracker in Microsoft Teams as a Loan Representative and approve the loan

- While logged in to your Microsoft 365 tenant, open a new tab and go to teams.microsoft.com.
- Navigate to the Teams channel you created, go to Loan Tracker and open the Amber Roriguez mortgage loan application that you created



The screenshot shows the Microsoft Teams interface with the Loan Tracker application open. The sidebar on the left shows the Teams channel structure. The main area displays the Loan Tracker application with a list of loan applications and a detailed view of the selected application (46700049). The detailed view shows loan information, application snapshot, and primary applicant details.

Loan number	Status	Applicant
11223349	Unsecured	Corey Gray (Sa...)
11223351	Secured	Parker Reyes (S...)
11223352	Unsecured	Elizabeth Irwin (...)
46700049	Mortgage	Amber

46700049 - Saved

Loan application
Principal amount: \$500,000.00
Application date: 10/28/2021
Loan term: 360
Loan type: Home loans

Loan application BPF
Active for 32 minutes

Loan Verification (32 Min)

Application snapshot

Loan information

46700049
Home loans
Mortgage

Principal amount
500,000 USD

Primary applicant

Amber
41, Single

Phone
(859) 555-0274

- Click through the steps and fill in the fields in the Loan Application BPF to advance the Loan application to a new stage.

78315778 - Saved
Loan application

\$500,000.00
Principal amount

11/10/2021
Application date

360
Loan term (months)

Fixed-rate mortgage
Loan type

Loan application BPF
Active for 22 minutes

Origination (22 Min)

Processing

Underwriting

Quality Check

Application snapshot

Loan information

78315778
Fixed-rate mortgage

Principal amount
500,000 USD

Loan term
360 Months

Allen Contoso

AllenContoso@example.com

Next Stage >

4. **Input** your initials in the **Confirmed By** textbox in the new Quality Check stage. Click **Next Stage**.

78315778 - Unsaved
Loan application

\$500,000.00
Principal amount

11/10/2021
Application date

360
Loan term (months)

Fixed-rate mortgage
Loan type

Loan application BPF
Active for 24 minutes

Quality Check (< 1 Min)

Closing

Application snapshot

Loan information

78315778
Fixed-rate mortgage

Principal amount
500,000 USD

Loan term
360 Months

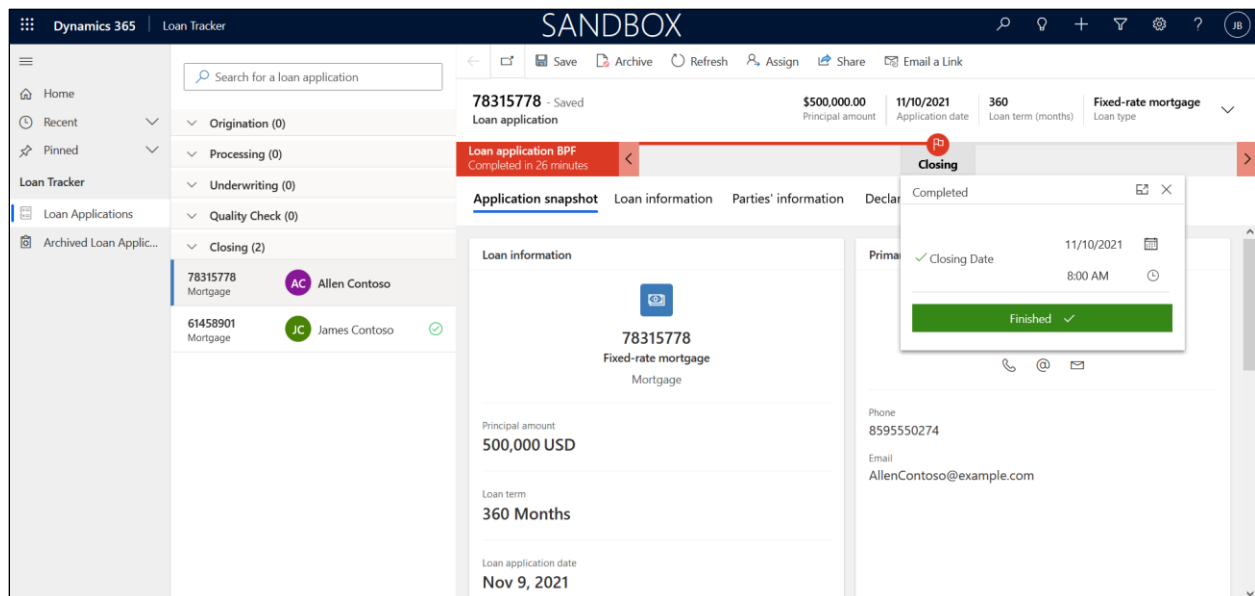
Allen Contoso

AllenContoso@example.com

Confirmed By
JB

Next Stage >

5. Close the loan



Congratulations! You have successfully created a new loan application using the Retail Banking Sample Portal and verified the loan application using Loan Tracker in Microsoft Cloud for Financial Services.

Summary

Nice work! You have completed **Lab 02 – Customer onboarding**.

In this lab, you learned how to do the following:

- Configured the Retail Banking Portal
- Extended the Loan Tracker application
- Embedded Loan Tracker in Microsoft Teams
- Created a new loan in the Retail Banking Portal and approve the loan in Loan Tracker