

LENDER JOURNEY

TRAINING MODULE

BRANCH USERS : MAKER

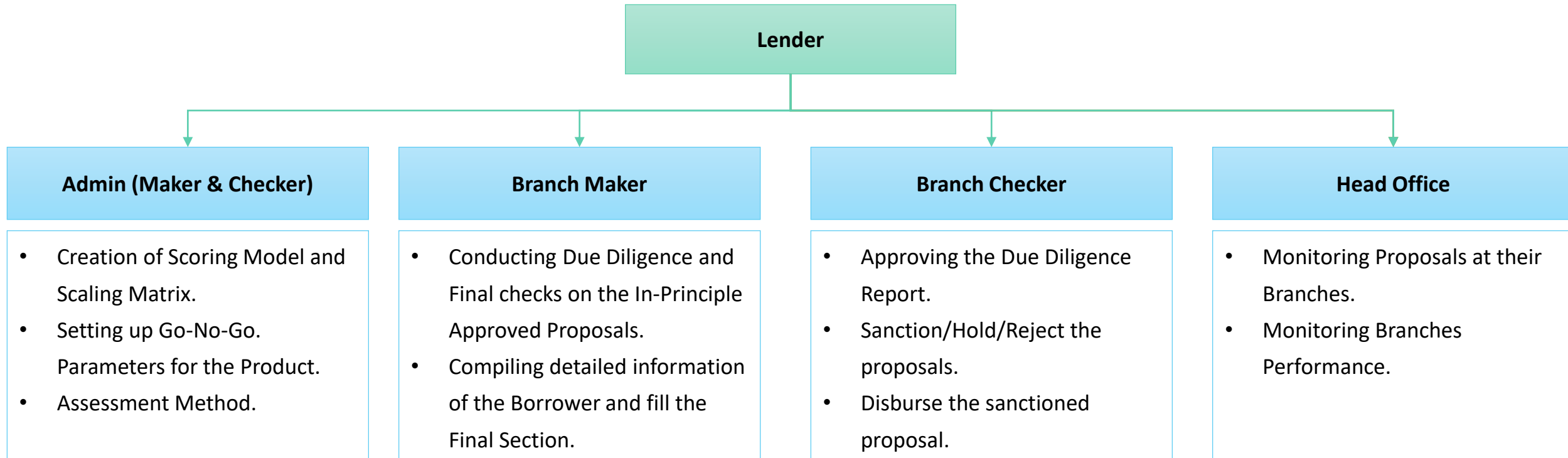
INDEX

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- 1 AUTO LOAN - DETAILED LENDER'S PROCESS FLOW
 2. CREATING DUE DILIGENCE REPORT - SCREENWISE WALK THROUGH
-

AUTO LOAN

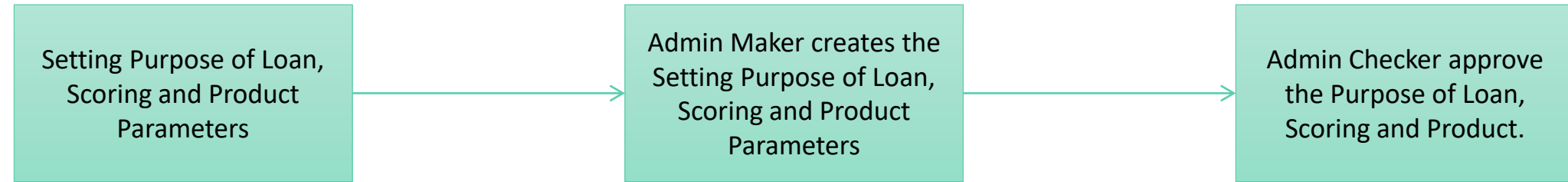
DETAILED LENDER'S PROCESS FLOW

OVERALL PROCESS

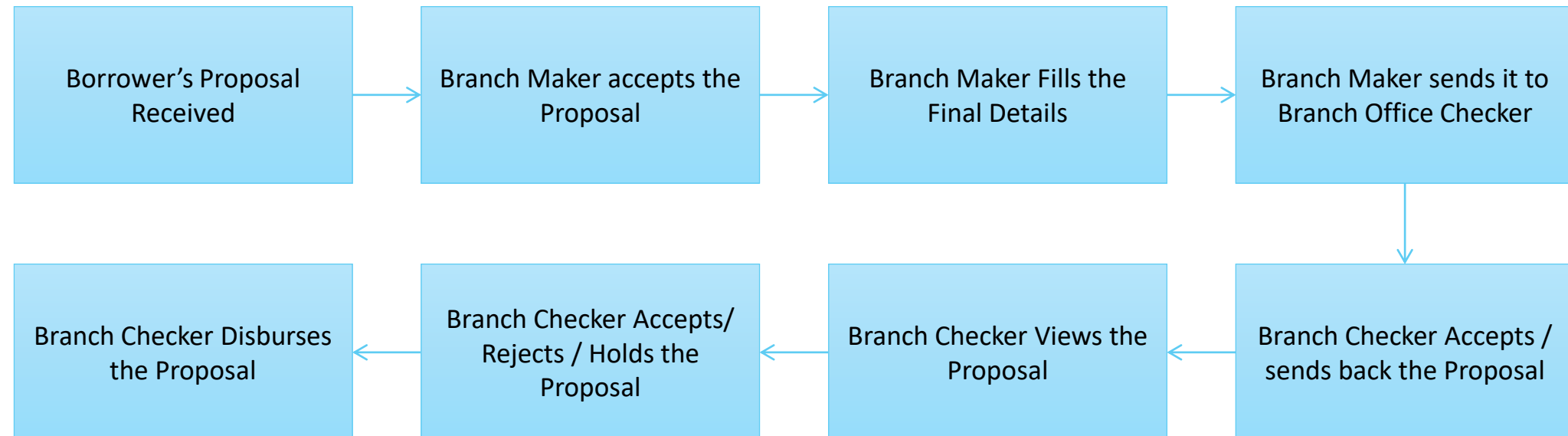


LENDER JOURNEY

In-principle Approval (Admin)




Sanction/ Disbursement (Branch Office)



CREATING DUE DILIGENCE REPORT


SCREENWISE WALK THROUGH

LOGIN

psbloansin **59**minutes.com™

Welcome Banker
Please **login** to your account

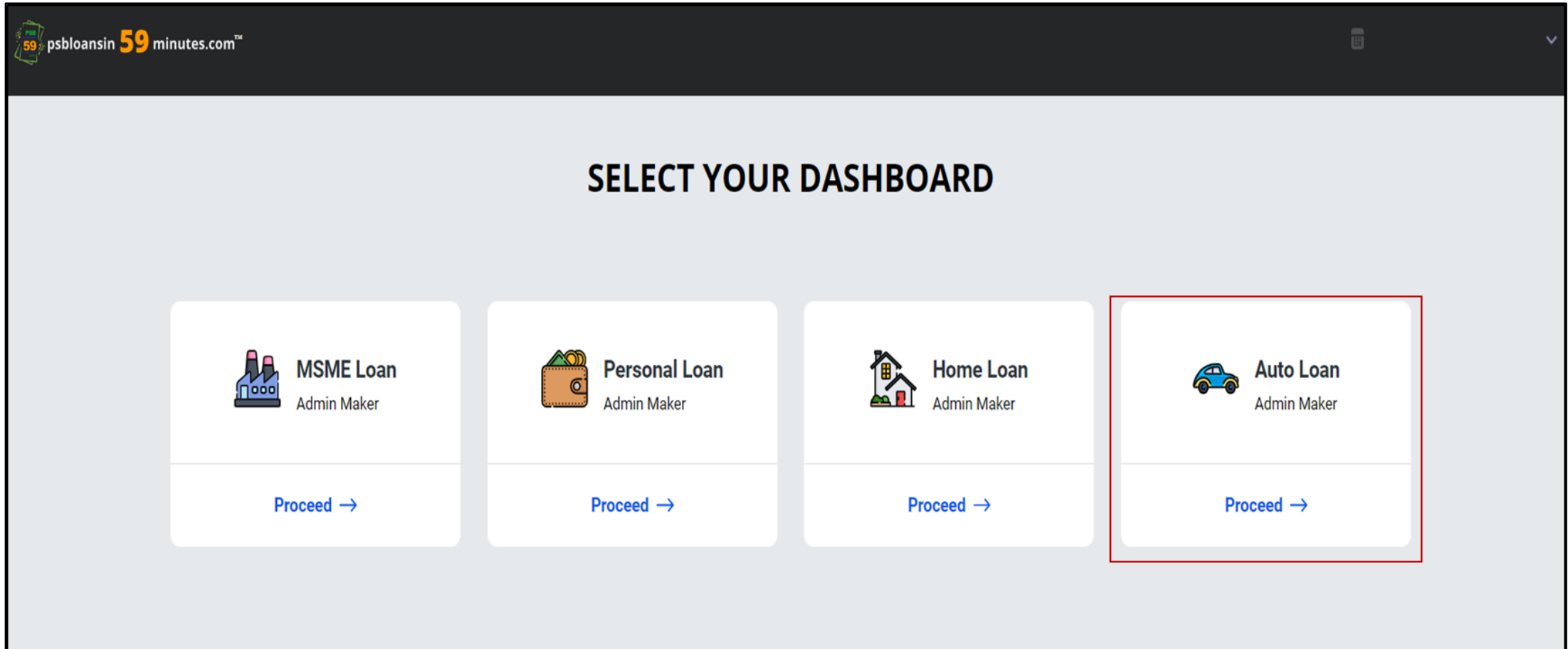
Your efforts lightens many lives

 Enter Registered E-Mail ID or Mobile I

Next

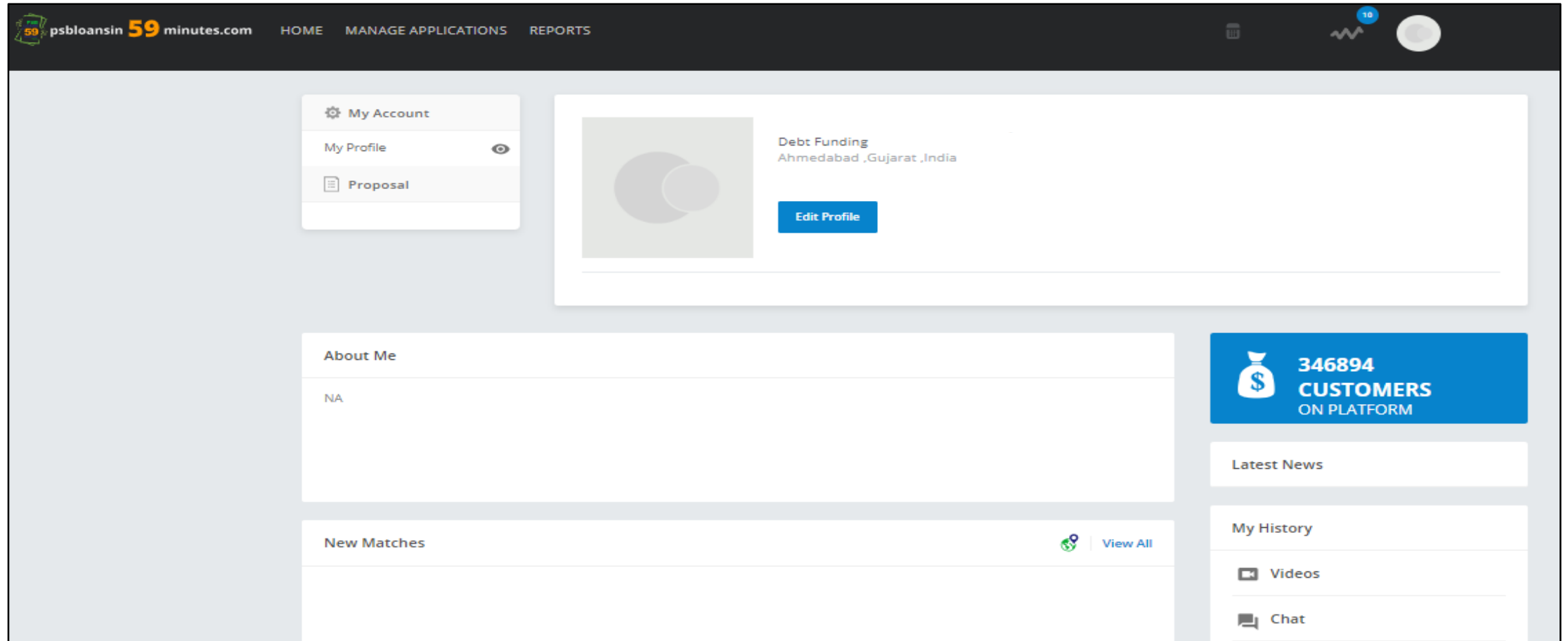
The URL is: <https://www.psbloansin59minutes.com/banker>

DASHBOARD




Lenders will select the dashboard based on the type of Product that they want to conduct the due diligence.

LANDING PAGE



Landing Page for Branch Maker.

MAKER ACCEPTS PROPOSAL







[HOME](#)
[MANAGE APPLICATIONS](#)
[REPORTS](#)
AUTO LOAN

New Proposals (14)

Pending (1)

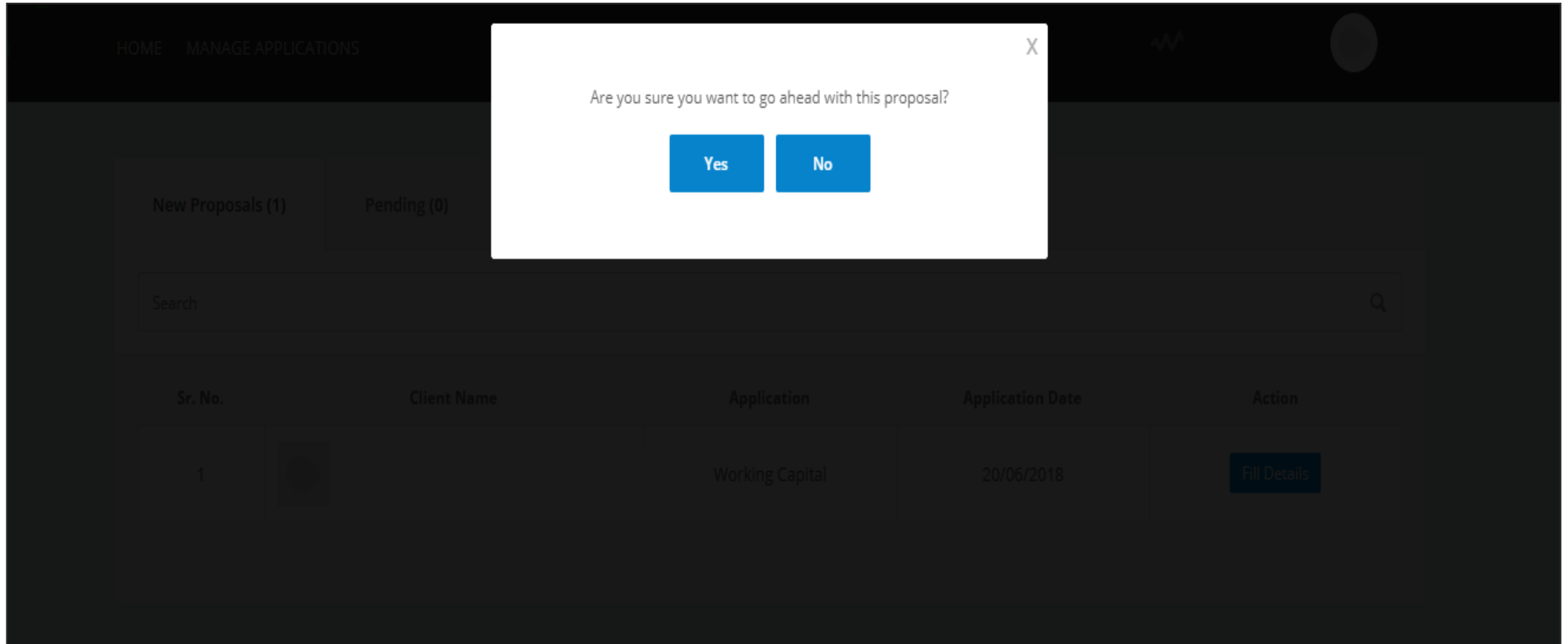
Assigned to Checker (0)

Proposals with other Makers (0)

Sr. No.	Client Name	Application Date	Final Application	Download CAM
1	 Kutch, Gujarat, India	09/07/2019	Fill Details	CAM
2	 Ahmedabad, Gujarat, India	09/07/2019	Fill Details	CAM
3	 Kutch, Gujarat, India	08/07/2019	Fill Details	CAM
4	 Ahmedabad, Gujarat, India	02/07/2019	Fill Details	CAM
5	 Ahmedabad, Gujarat, India	26/06/2019	Fill Details	CAM


- Click on 'Manage Applications' and under 'New Proposal' section, Branch Maker can view all Proposals.
- Maker can accept the proposal by clicking on 'Fill Details'.



PROPOSAL




On Acceptance of the Proposal, a confirmation pop-up is shown.


PROPOSAL DETAILS


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[AUTO LOAN](#)



New Proposals (14)
Pending (1)
Assigned to Checker (0)
Proposals with other Makers (0)



Sr. No.	Client Name	Application Date	Proposal Taken Date	Final Application	Action	Download CAM
1	 Bhuj, Gujarat, India	01/06/2019		Edit Form	View Trail	CAM

- Once the Maker accepts a proposal, the same proposal shifts to the 'Pending' tab.
- Maker can then fill the Form by clicking on 'Edit Form'.


VIEW TRAIL

DDR TRAIL



PARTICULARS	DATE
Assigned To Maker	16/05/2018
DDR Submitted to Checker	16/05/2018
DDR Submitted to Approver	16/05/2018
DDR Approved	16/05/2018

Once clicked on 'View Trail', the proposal traversal dates are displayed.

PROPOSAL ASSIGNED TO CHECKER



HOME MANAGE APPLICATIONS REPORTS

New Proposals (48)
Pending (14)
Assigned to Checker (8)
Proposals with other Makers (0)

Sr. No.	Client Name	Application	Application Date	Proposal Taken Date	Assigned On	Checker Name	DDR	DDR Status	Action	Download CAM
1	 Borrower Bhuj, Gujarat, India	Auto Loan	19/02/2019	12/03/2019		NA	View DDR	NA	View Trail	CAM
2	 Borrower Bhuj, Gujarat, India	Auto Loan	25/02/2019	25/02/2019	25/02/2019	NA	View DDR	NA	View Trail	CAM

- Once the Maker sends the proposal to Checker, the same proposal shifts to the 'Assigned to Checker' tab.
- Maker can view the Due Diligence Report by clicking on 'View DDR' tab.

PROPOSALS WITH OTHER MAKERS


[HOME](#) [MANAGE APPLICATIONS](#) [REPORTS](#)

AUTO LOAN

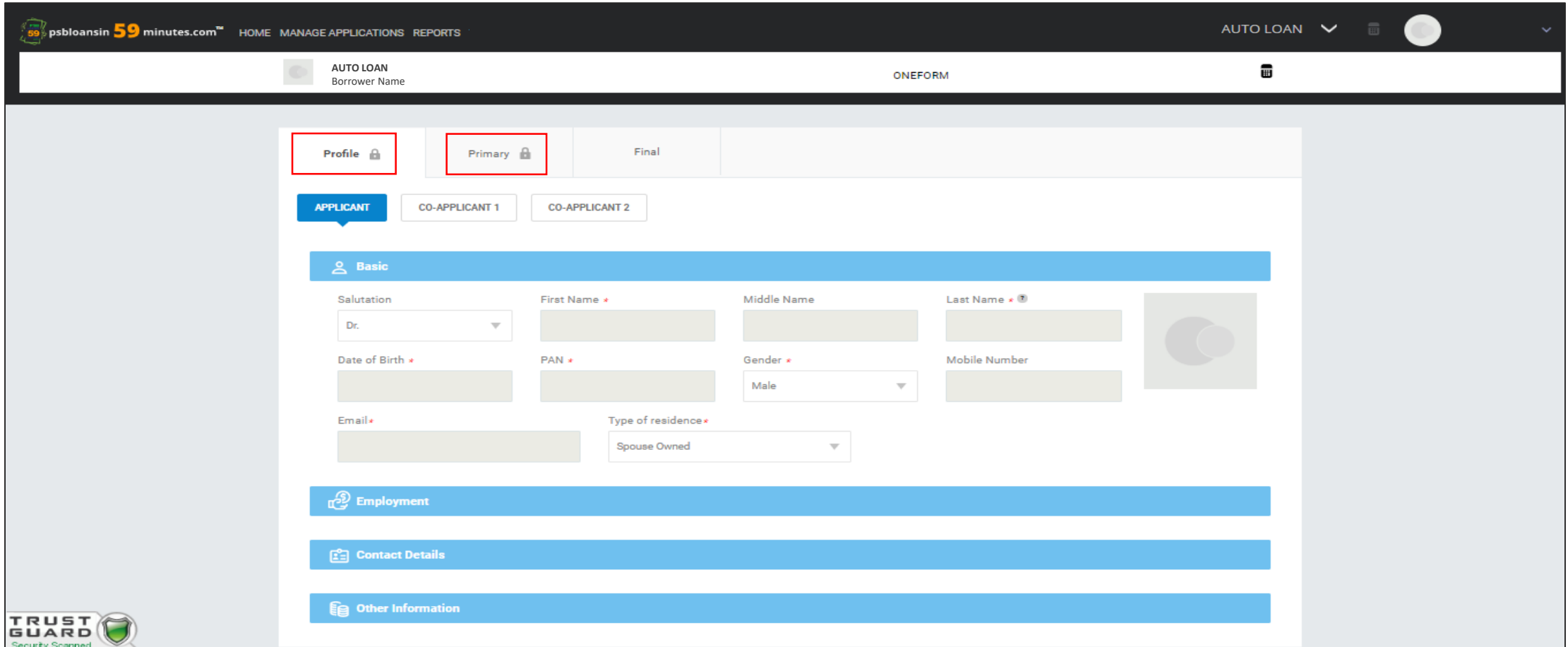
New Proposals (14)
Pending (1)
Assigned to Checker (0)
Proposals with other Makers (0)

Search

Sr. No.	Client Name	Application Date	Proposal Taken Date	Application with	Maker/Checker Name	Action
No Application(s) Available!						

Proposals accepted by other Makers are shown under the Proposals with Other Maker Tab.

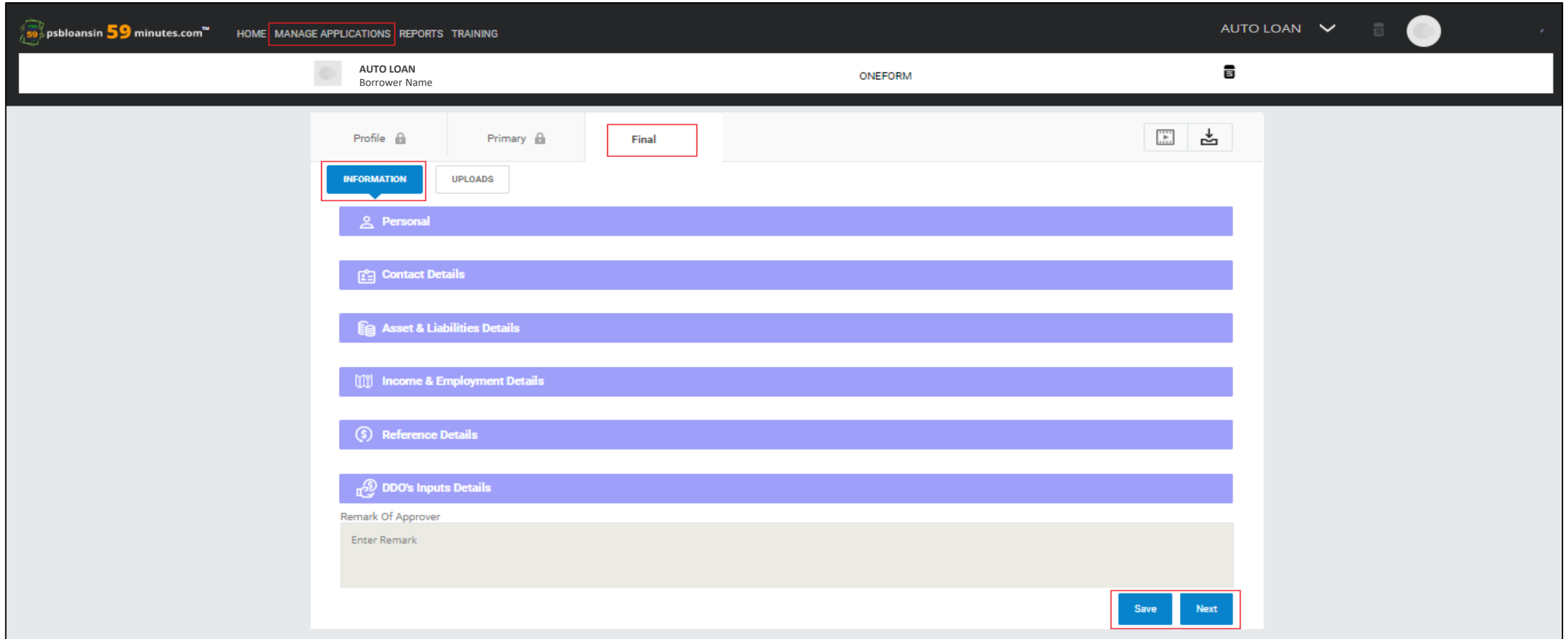
PROFILE/PRIMARY SECTION



The screenshot displays the PSB Loans ONEFORM interface. At the top, the navigation bar includes the PSB Loans logo, the text "psbloansin 59 minutes.com™", and links for HOME, MANAGE APPLICATIONS, and REPORTS. On the right, there are links for AUTO LOAN, a calendar icon, and a user profile icon. Below the navigation bar, the form is titled "AUTO LOAN" with a sub-header "Borrower Name". The main content area features three tabs: "Profile" (highlighted with a red box and a lock icon), "Primary" (also highlighted with a red box and a lock icon), and "Final". Below the tabs, there are three buttons: "APPLICANT" (highlighted in blue), "CO-APPLICANT 1", and "CO-APPLICANT 2". The "APPLICANT" section is expanded, showing a "Basic" information section with fields for Salutation (Dr.), First Name, Middle Name, Last Name, Date of Birth, PAN, Gender (Male), Mobile Number, Email, and Type of residence (Spouse Owned). Below the Basic section are three blue bars representing "Employment", "Contact Details", and "Other Information" sections. In the bottom left corner, there is a "TRUST GUARD Security Scanned" logo.

- 'Profile' and 'Primary' tabs are auto filled from the In-Principle journey and are hence locked.
- The Branch Maker has to click on 'Final' tab to fill the final form.

FINAL SECTION - INFORMATION



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AUTO LOAN Borrower Name ONEFORM

Profile Primary **Final**

INFORMATION UPLOADS

Personal

Contact Details

Asset & Liabilities Details

Income & Employment Details

Reference Details

DDO's Inputs Details

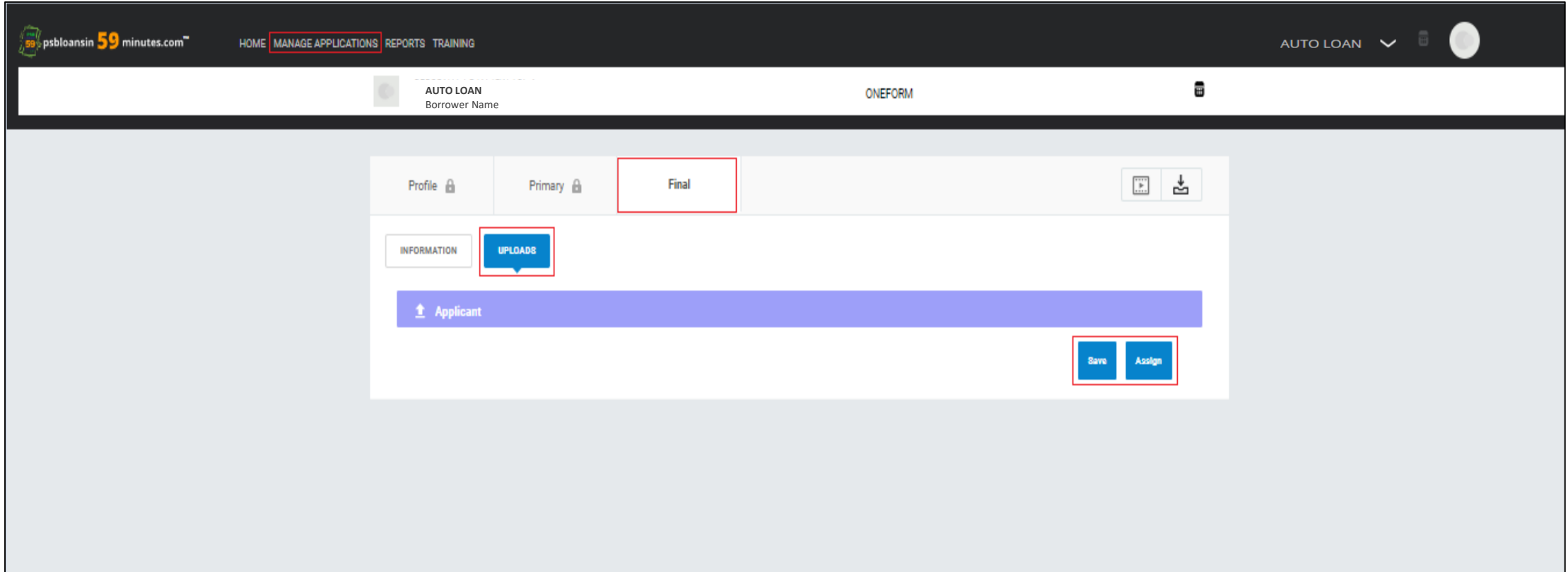
Remark Of Approver

Enter Remark

Save Next

- When Maker opens the Final section, the First step is to fill the “Information Section”.
- On successfully filling the required information, the Branch Maker can move onto upload the documents collected from the borrowers.

FINAL SECTION - UPLOAD



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HOME **MANAGE APPLICATIONS** REPORTS TRAINING

AUTO LOAN Borrower Name

ONEFORM

Profile Primary **Final**

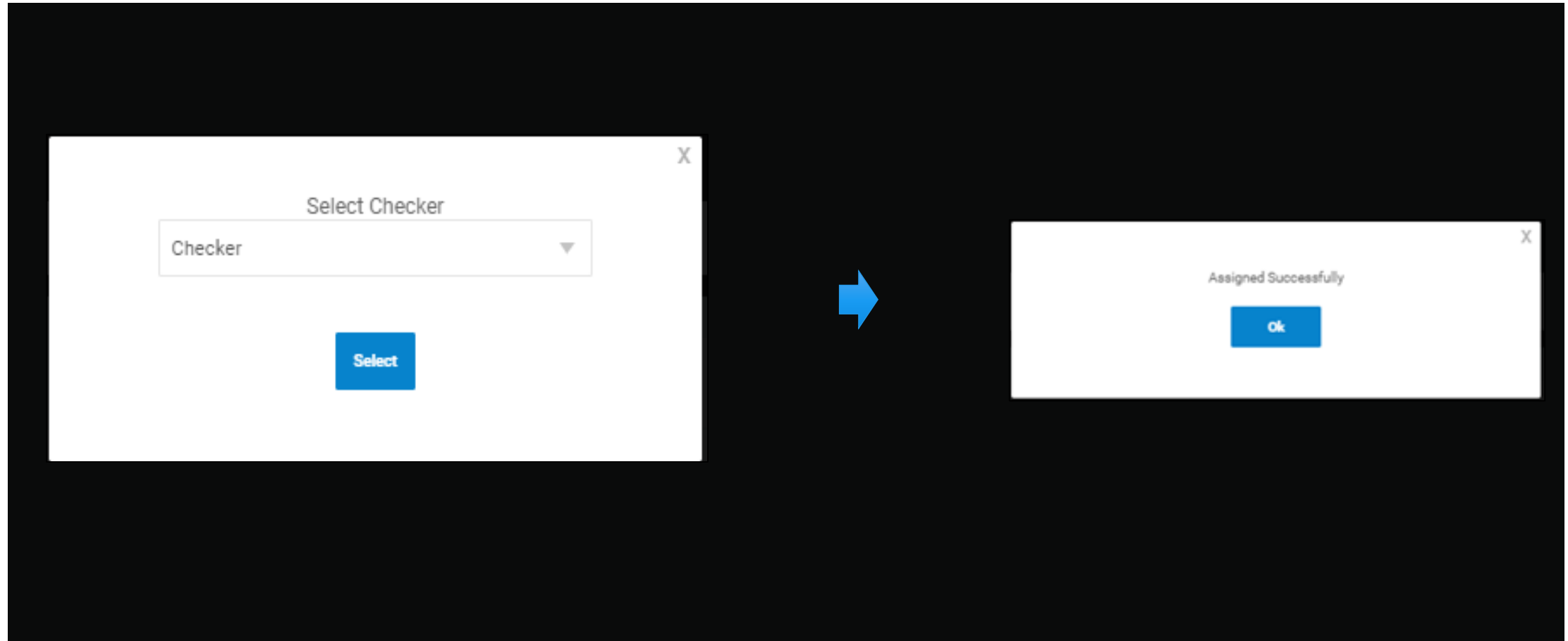
INFORMATION **UPLOADS**

Applicant

Save Assign

- Maker can upload documents of the Borrower.
- After filling all the details in “Final Section” the maker can click on “Assign” button and assign the proposal to the Branch Checker.

ASSIGN TO CHECKER



Select the “Checker Name” to send the DDR for approval. After selecting, a confirmation pop up will be shown and the proposal will be successfully assigned to Branch Checker.

REPORTS

Eligible

Number of Eligible Proposals : 10

From

25/02/2019

To

25/07/2019

Search

Download

Product List

Select Product

Sr No.	Application Code	Name of Customer	Email of Customer	Mobile No. of Customer	In Principle Date	In-principle Amount in Rs.	Branch Name	Branch Code	Source	Details
1					09/07/2019	7,633,214.29	Shirpur Ahmedabad(Gujarat)	SHIRPUR	Market Place (New)	
2					08/07/2019	3,450,000.00	Shirpur Ahmedabad(Gujarat)	SHIRPUR	Market Place (New)	
3					27/08/2019	4,950,000.00	Shirpur Ahmedabad(Gujarat)	SHIRPUR	Market Place (New)	
4					26/06/2019	318,500.00	Shirpur Ahmedabad(Gujarat)	SHIRPUR	Bank Specific URL (New)	
5					20/06/2019	3,000,000.00	Shirpur Ahmedabad(Gujarat)	SHIRPUR	Market Place (New)	
6					19/06/2019	2,496,000.00	Shirpur Ahmedabad(Gujarat)	SHIRPUR	Market Place (New)	
7					15/06/2019	1,342,245.10	Shirpur Ahmedabad(Gujarat)	SHIRPUR	Market Place (New)	
8					14/06/2019	1,264,640.00	Shirpur Ahmedabad(Gujarat)	SHIRPUR	Market Place (New)	
9					11/06/2019	1,631,045.10	Shirpur Ahmedabad(Gujarat)	SHIRPUR	Market Place (New)	

Once the Maker clicks on 'Reports', he will be able to view all the Eligible Proposals tagged to that Branch.

THANK YOU

Mail us at :

Borrower Journey Queries: support@psbloansin59minutes.com
Banker Journey Queries: banksupport@psbloansin59minutes.com

Customer Helpline No: 079-41055999