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LENDER USER/ BRANCH CREATION UPLOAD PROCEDURE

FROM
ADMIN CHECKER & HEAD OFFICE

Checkpoints to be considered by Bank Admin User while Uploading files: -


- Download format file from HO / Admin checker login > Admin > Lender user Upload > “Lender User Template”
- Fill require details as per format. All fields except first column "ID", are compulsory and are required to be filled for Lender User On-boarding in correct format.
- Please enter City and State names from the “Online PSB Loans-City & State Master” provided.
- After providing all details please upload said file on Lender User Upload > Choose file > Browse require file > Upload.
- Uploaded Users can be viewed from “Lender Users Created in Database” button.
- Mail ID should be unique and not be repeated with past users and present uploading users.
- Mobile Number should be entered in correct format, i.e. only 10 digits to be entered. (Do not add +91 or 0, remove all spaces in the number)
- Avoid repetition of Customer Data (Mobile Number and E-Mail Address) across different sheets.
- Provide only 1 Mobile Number and Mail ID per Customer. Avoid using Land Line Numbers.
- Avoid uploading files with single or double counts of customer. Provide data in a single consolidated sheet.

Checkpoints to be considered by Bank Admin User while Uploading files: -

- Please remove spaces from Pin-code.
- Please write following options in "role_id" column:
 - Branch_Maker - Like credit officer who will meet customer in person and fill detailed report on platform.
 - Branch_Checker/Approver – Like branch manager who will review details submitted by borrower and branch maker and take decision. (person who has sanctioning authority)
 - Admin_Maker – Person from bank head office who will create product and scoring model.
 - Admin_Checker – Person from bank head office who will review and approve product created by admin maker.
 - Head_Office – Person who will review all proposals received at bank level. (viewing rights)
- Please write following options in "MSME_Funding" & "PL_Funding" columns:
 - Yes
 - No

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My Profile


 Proposal


Small Industries Development Bank ...

Debt Funding

Hosur ,Tamil Nadu ,India

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About Me

Small Industries Development Bank of India (SIDBI) set up on 2nd April 1990 under an Act of Indian Parliament, acts as the Principal Financial Institution for Promotion, Financing and Development of the Micro, Small and Medium Enterprise (MSME) sector as well as for co-ordination of functions of institutions engaged in similar activities. The MSME sector, the focused business domain for SIDBI, has been an important pillar of the Indian Economy, contributing up to 33% in the country's Gross Value Added (GVA) as per FY 2014-15, with 51 million enterprises providing employment to over 117 million Indians. Over the years, SIDBI has been working towards the sustainable development of MSME sector, pioneering efforts that have manifested in creation of economic wealth, its distribution for



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Location
Branch Setup
Employee Setup
Customer User Upload
Lender User Upload

Lender User Upload:-

Choose Files
No file chosen

Upload File in downloaded template format

Download Template/Sample File

Lender User Template

Lender Users Created in Database

CapitaWorld City State Master

Lenders in Database

City-State Master

| Sr.No | Name | Created Date | Active | Action |
|-------|-------------------|--------------|--------|----------------------|
| 1. | download (3).xlsx | 25/10/2018 | Yes | Open |
| 2. | download (3).xlsx | 25/10/2018 | Yes | Open |

Checkpoints to be considered by Bank Admin User while Uploading files:-

1. Please Upload New Users in "Lender User Upload File" tab.
2. Uploaded Users can be viewed from "Lender Users Created in Database" button.
3. All fields except first column "ID", are compulsory and are required to be filled for Lender User On-boarding in correct format.
4. Mail ID should be unique and not be repeated with past users and present uploading users.
5. Mobile Number should be entered in correct format, i.e. only 10 digits to be entered. (Do not add +91 or 0, remove all spaces in the number)
6. Avoid repetition of Customer Data (Mobile Number and E-Mail Address) across different sheets.
7. Please write following options in "role_id" column:
 - a) Branch_Maker
 - b) Branch_Checker/Approver



THANK YOU

POWERED BY -

ONLINE PSB LOANS LIMITED