```mermaid
flowchart TD

Start["Dealer/FI Signs the PO"]

Start --> Q1{Is this dealer exist in DynaLytics?}

Q1 -- No --> A1["Go to user management -> Dealers"]
A1 --> A2["Click on Add Dealer button and Create Dealer"]

Q1 -- Yes --> B1["Go to user management -> Financial Institutions"]
A2 --> B1

B1 --> B2["Clicks on 'Onboard Financial Institutions' button, fill out form select right dealer and create FI"]

B2 --> C1["Go to new page and ask user to upload CSV file with SN and branch info"]

C1 --> Q2{Ask admin if they want to create regions?}

Q2 -- Yes --> D1["Go to new page to upload region csv file"]
Q2 -- No --> Q3{Ask admin if they want to create multiple users?}
D1 --> Q3

Q3 -- Yes --> E1["Go to user upload page and upload csv file"]
E1 --> E2["Email goes to all users with their credentials"]

Q3 -- No --> F1["Show page that will ask email for support person so we can send them instruction for turning on the functionality so email start going to logs email"]
E2 --> F1

F1 --> End([END])
```

Annotations:

- Next to "Go to new page and ask user to upload CSV file with SN and branch info": Need to create sample CSV file that we can give to FI and they fill out and give that info back to us.

- Next to "Go to new page to upload region csv file": Need to create sample CSV file that we can give to FI and they fill out and give that info back to us.

- Next to "Go to user upload page and upload csv file": Need to create sample CSV file that we can give to FI and they fill out and give that info back to us.

- Next to "Email goes to all users with their credentials": Need to create nice looking html email format

- Next to "Show page that will ask email for support person...": Need to create nice looking html email, will need content

Onboarding Process

Home / Financial Institue / Onboarding - Branch-Stations

FI NAME

Download Sample
CSV File

Upload file   [Upload]

If error occurs in upload, display message here

(Next)   (Skip)

You are trying to onboard below data. Your data is not yet saved. Press confirm to save the data. If you notice any discrepancy please upload file again or contact system administrator.

Here we will display uploaded data with status so user can confirm them before we go ahead

(Confirm)

• When admin comes to this page for the first time, confirmation section wont be visible.
• Confirmation section will be visible only if user upload valid file and click on next button.
• Admin can skip this page also.
• Once user clicks on confirm, we will create branches and stations for this FI into database and go to next step.
• Any error in data entry will be display here and Adam/Amit will be notified with issue.

• Admin can download sample file also.

Side Menu Bar

Onboarding Process

FI NAME

Download Sample
CSV File

Upload file | Upload |

If error occurs in upload, display message here

| Next | | Skip |

You are trying to onboard below data. Your data is not yet saved. Press confirm to save the data. If you notice any discrepancy please upload file again or contact system administrator.

Here we will display uploaded data with status so user can confirm them before we go ahead

| Confirm |

• When admin comes to this page for the first time, confirmation section wont be visible.
• Confirmation section will be visible only if user upload valid file and click on next button.
• Admin can skip this page also.
• Once admin clicks on confirm, we will create regions for this FI into database and go to next step.
• Any error in data entry will be display here and Adam/Amit will be notified with issue.

• Admin can download sample file also.

Side Menu Bar

Onboarding Process

FI NAME

Download Sample
CSV File

Upload file   [Upload]

If error occurs in upload, display message here

(Next)   (Skip)

You are trying to onboard below data. Your data is not yet saved. Press confirm to save the data. If you notice any discrepancy please upload file again or contact system administrator.

Here we will display uploaded data with status so user can confirm them before we go ahead

(Confirm)

• When admin comes to this page for the first time, confirmation section wont be visible.
• Confirmation section will be visible only if user upload valid file and click on next button.
• Admin can skip this page also.
• Once admin clicks on confirm, we will create users for this FI into database and send email to each user and then go to next step.
• Any error in data entry will be display here and Adam/Amit will be notified with issue.

• Admin can download sample file also.

Side Menu Bar

Onboarding Process

FI NAME

Home   /   Financial Institue / Onboarding - Support

Please provide us email address for dealer support so we can send instruction on how to turn on functionality for sending email with log files. You can add multiple emails by separating them by comma.

Send Instruction to Support

- Admin have to provide email address where email go. Email will contain information like how to turn on functionality to send email every 15 min.
- Once admin clicks send button, Email will go to everyone.
- Any error in data entry will be display here and Adam/Amit will be notified with issue.

Side Menu Bar

Onboarding Process

FI NAME

Home / Financial Institue / Onboarding - Complete

Successfully onboarded XYZ.

Total No of Branchs: XX
Total No of Regions: XX
Total No of Stations: XX
Total No of Users: XX

Support instruction sent to: [Emails]

Send Email To Dealer

• Admin clicks send button, Email will go to main dealer with new company is onboarded.
• Any error in data entry will be display here and Adam/Amit will be notified with issue.

Side Menu Bar