



## FINANCIAL LOAN APPLICATION MANAGEMENT SOFTWARE

### Client

Finance Agency

### Business Overview

Financial Application Management Software redesigned the existing third party open source solutions and implemented the additional features that are required for the users to create/update the new application with all the necessary information among the financial loan request application Process.

### Business Challenge

- Lack in technology
- Upload the documents related to the Application
- Processing of Application brings more Time consuming.
- Progress of the Application and verification of Application by E-sign

### Approach/Solution

Financial loan application Management software provides the ability for the users to create the loan application by filling in necessary information in several tabs.

Users / Agencies can register themselves online and shall be able to easily navigate through several tabs and provide the necessary information like Personal, Financial and project information that is necessary to process a loan application.

Users can upload the supporting documents that are necessary for approval through upload documents sections.

After completing the application user can save and sign it online through e-signature and submit the same for processing.

Users / Agencies can track their applications status through their dashboard. The submitted application can be downloaded and printed. Bank officials can communicate with the Users / Agencies through notes section by typing in the comments with regard to application corrections/requirements.

### Results

- Users can be able to View, Edit and upload documents necessary for loan approvals in each stage.

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- This solution has the ability to print the document as a whole or by sections.
- The users and administrators can able to communicate with users regarding the applications with the Application Notes section.
- Admins have the capability to add users with different roles and access.
- Users and Admin have the ability to generate reports with various parameters of the application and export the same into PDF or CSV format.

## **Benefits**

Highly cost effective with increased productivity. Processing of the Application became more faster than the Previous Process. This solution has been implemented with the following features.

- Safe and secure registration process for the new user.
- Unlimited upload and download of documents.
- Data export using user defined filters
- Automated text alerts
- Get E-Signature of the users applying application forms

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