

Customers Loans Lifecycle Management

How the screen works

All detail screens of a financial instrument in the swim lane "Lifecycle Management" are structured according to the same pattern:

- By selecting a subpage in the red marked area on the left, corresponding additional individual information of the financial instrument is displayed. The circled number indicates how much corresponding information is available.
- The main information is always displayed in the blue-marked middle area of the screen.
- To edit the financial instrument, e.g. to enter a change in the instalment for a loan, the respective **business event** must be selected in the green marked area on the right of the list. A data entry window will then open at the same place to enter all the data required for the business transaction.

The screenshot displays the 'Customers Loans Lifecycle Management' interface. It is divided into three main sections:

- Left Panel (Red border):** A vertical list of subpages. The 'Collaterals' subpage is highlighted in yellow. Circled numbers indicate the number of items for certain subpages: 'Outpayments' (1), 'Business Events' (2), 'Interest Conditions' (1), 'Annuities' (1), 'Notes' (1), and 'Documents' (5).
- Middle Panel (Blue border):** Displays detailed information for a specific loan. The title is '001-FK_LN-A-Consumer-Annuity - 001-FK - EUR 33,000.00'. It contains two main sections:
 - Loan:** A table with the following data:

Deal number	001-FK_LN-A-Consumer-Annuity
IBAN	DE50 FSMB DE00 0001 LN00 A0
Product	Instalment loan
Deal conclusion date	Sep 13, 2018
Loan volume	33,000.00 EUR
 - Current loan data:** A table with the following data:

Remaining principal	27,936.25 EUR
Remaining period (End date)	29 month(s) (Sep 1, 2021)
Receivables due	0.00 EUR
Days past due	0 day(s)
Next due payment	1,026.84 EUR (Apr 1, 2019)
Future interest and charges	2,868.93 EUR
- Borrower (001-FK):** A table with the following data:

Customer	Felix Klein
Customer type	Private customer
Legal form	/

- Right Panel (Green border):** A 'Business event' dropdown menu. The current selection is 'Please select'. The dropdown list shows the following options: 'Please select', 'Payment Holiday', 'Deferral', 'Irregular Payment', and 'Early Redemption'.

Customers

In the screen Customers, the basic data of all customers are displayed.

In case of a loan, the main borrower is displayed first, and the corresponding data of co-applicants, guarantors or other participants can also be displayed via further tabs.

004-MH_LN-A-Consumer-Annuity-beEP - 004-MH - EUR 21,000.00

[Borrower 004-MH](#)

Borrower 904-SH

General

Customer number	004-MH
Customer	Mathias Hoffmann
Customer type	Private customer
Legal form	/

Private data

First name	Mathias
Last name	Hoffmann
Birthday	Jul 13, 1975
Town of birth	Idstein
Nationality	Germany
Sex	M
Marital status	MARRIED

Address

Street / No.	Leipziger Strasse 77
Zip code / Town	65201 Wiesbaden
Country	Germany

Deal data

Industry type	Activities of households as employers of domestic personnel (97)
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Further data

Locale	DE
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