

Documents 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 Loans Lifecycle Management interface. On the left, a sidebar lists various subpages, each with a circled number indicating available information. The main area shows details for a specific loan, and a dropdown menu for business events is open on the right.

Left Sidebar (Red Marked Area):

- Overview
- Outpayments (1)
- Business Events (2)
- Interest Conditions (1)
- Annuities (1)
- Deferrals
- Fees
- Unexpected repayments
- Notes (1)
- Payment Plan
- Commitment
- Collaterals
- Payment Routes
- Account Balance
- Customers
- Income/Expenses
- Legitimation
- Employment
- History
- Documents (5)
- Payment Behaviour
- Dunning History

Main Area (Blue Marked Area):

001-FK_LN-A-Consumer-Annuity - 001-FK - EUR 33,000.00

Loan

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

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)

Customer	Felix Klein
Customer type	Private customer
Legal form	/

Right Area (Green Marked Area):

Business event

Please select

- Please select
- Payment Holiday
- Deferral
- Irregular Payment
- Early Redemption

Documents

In the mask Documents, all documents generated or sent in for the financial instrument are listed (documents sent, printed, returned by the client, etc.). This mask can therefore be used for the audit trail.

Clicking on the document link in the Name column opens the document in a separate tab of the browser.

By clicking on the link in the column Event, the screen [Business Events](#) is opened (see left sidebar). This screen is then pre-filtered, i.e. not all business events for the financial instrument are listed, but only those that are related to the corresponding document (in the Business Events screen opened in this way, however, all other business events can be shown and hidden again if required).

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

Created on	Name	Event
Apr 18, 2021, 10:57:46 PM	Kreditvertrag_004-MH-Mathias_Hoffmann.pdf	Print Deal Contract
Apr 18, 2021, 10:57:46 PM	Beratungsdokument_004-MH-Mathias_Hoffmann.pdf	Print Deal Contract
Apr 18, 2021, 10:57:46 PM	Ausweisdokument_004-MH-Mathias_Hoffmann.pdf	Print Deal Contract
Apr 18, 2021, 10:57:46 PM	Gehaltsnachweis_004-MH-Mathias_Hoffmann.pdf	Print Deal Contract
Apr 18, 2021, 11:59:54 PM	Testdeal_004-MH_LN-A-Consumer-Annuity-beEP.pdf	Note
Apr 19, 2021, 1:06:15 AM	ZusaetzlicherKreditnehmer_004-MH_Mathias_Hoffmann.pdf	Add Customer
Apr 19, 2021, 3:25:09 AM	Sondertilgung_004-MH_02.01.19.pdf	Irregular Payment
Apr 19, 2021, 5:52:36 AM	Sondertilgung_004-MH_20.03.19.pdf	Irregular Payment