

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: 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, and Dunning History. The main content area is titled "001-FK_LN-A-Consumer-Annuity - 001-FK - EUR 33,000.00" and contains three sections: "Loan" (Deal number, IBAN, Product, Deal conclusion date, Loan volume), "Current loan data" (Remaining principal, Remaining period, Receivables due, Days past due, Next due payment, Future interest and charges), and "Borrower (001-FK)" (Customer, Customer type, Legal form). On the right, a "Business event" dropdown menu is open, showing options: Please select, Please select, Payment Holiday, Deferral, Irregular Payment, and 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