How to enter Systems & Applications Information

1 Click "4. Systems & Applications"
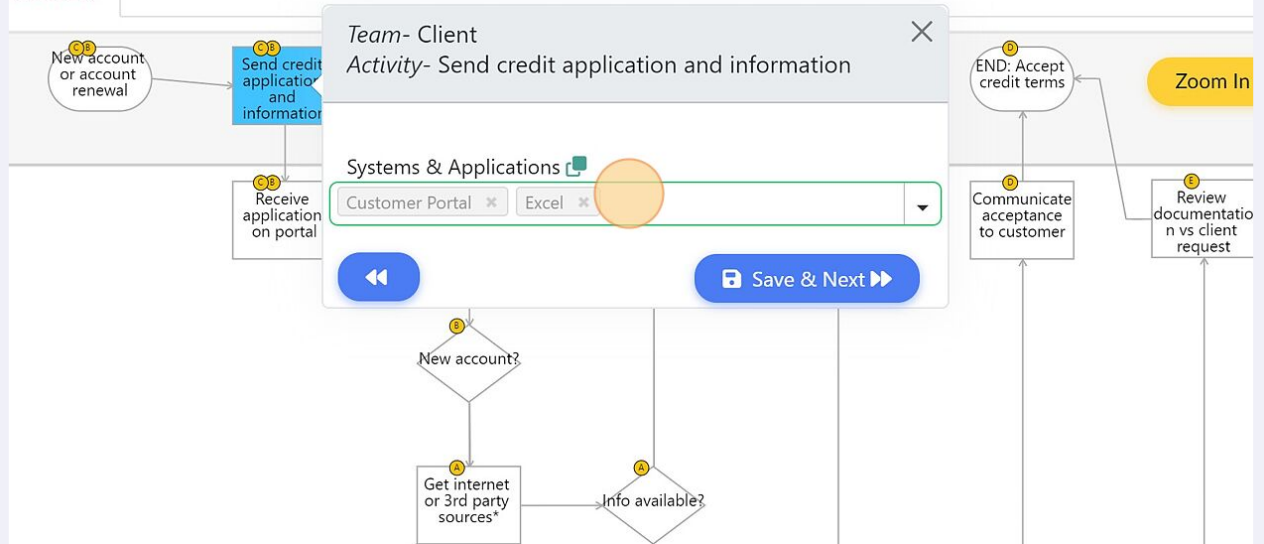
More

3. Team Salary(s)

3 of 3 Team details have been set

✓

4. Systems & Applications

21 of 22 activities have their Systems & Applications set

✗

7. Periodic Activities

8. Volume
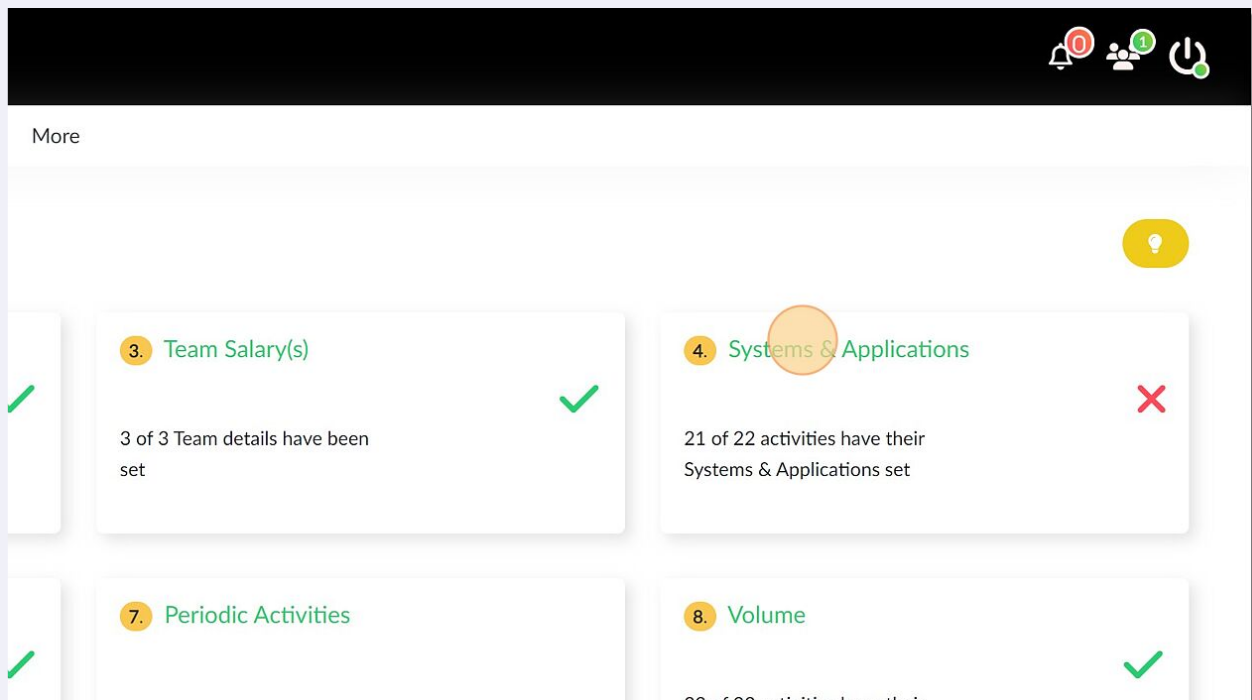
2 Click on activity to enter its Systems

n activity to review Systems & Applications

ess Map

edit Set-up

New account or account renewal

Send credit applicatio and informatio

Receive application on portal

Team- *Client*
Activity- Send credit application and information ✕

Systems & Applications

Customer Portal ✕ Excel ✕ ▾

◀◀   💾 Save & Next ▶▶

END: Accept credit terms

Communicate acceptance to customer

Review documentatio n vs client request

Zoom In

New account?

Get internet or 3rd party sources*

Info available?

---

3 After entering all systems, Click "Save & Next". Repeat the steps for all the other activities

Send credit applicatio and information

Receive applicatio on portal

Team- *Client*
Activity- Send credit application and information ✕

Systems & Applications

Customer Portal ✕ Excel ✕ ▾

◀◀   💾 Save & Next ▶▶

END: Accept credit terms

Communicate acceptance to customer

Review documentatio n vs client request

Zoom In   Zoom Out

New account?

Get internet or 3rd party sources*

Info available?

Approve
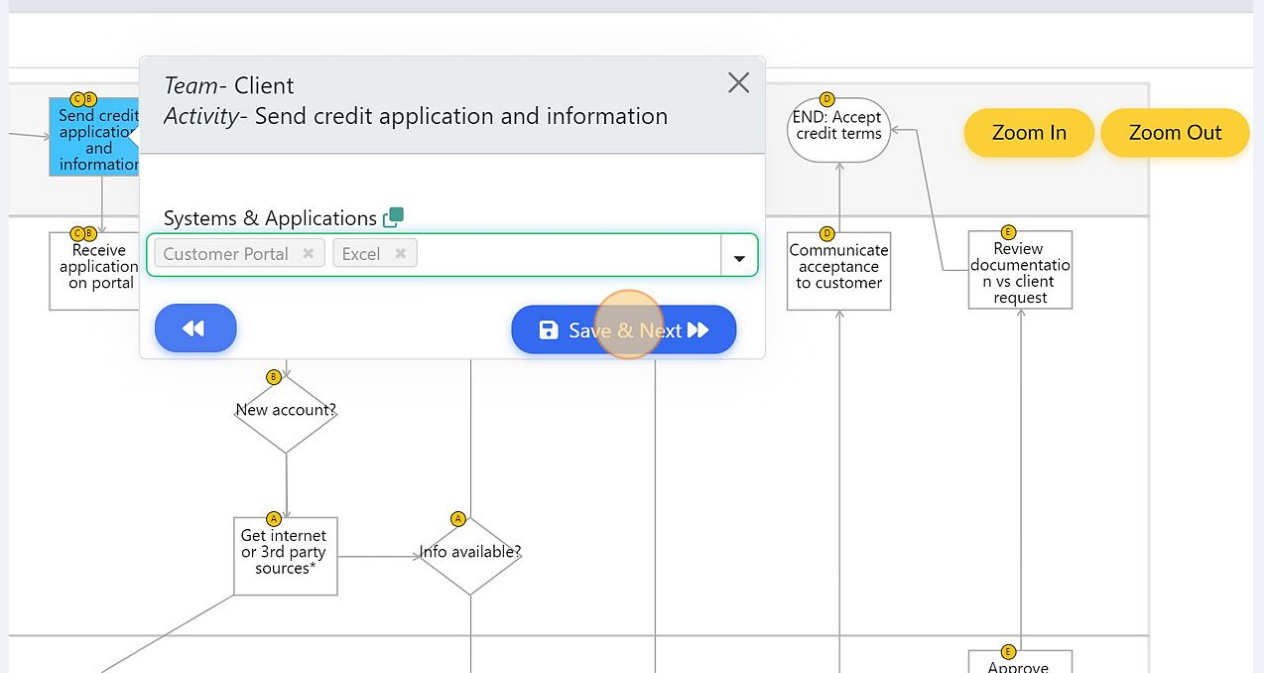
4 You can also enter all the systems in the field in the input panel on the right side and select the systems for each activity from the drop down menu

Expand Map ▶

Previous   Next

Input & Edit   Observations

Bulk Upload   ⌄

Systems & Applications Entered - 20 of 22

Add New Systems & Applications

SAP

Client   ⌃

Activity	Systems & Applications
New account or account renewal	Customer Portal ✕ Excel ✕ ⌄
Send credit application and	Customer Portal ✕ Excel ✕ ⌄

Zoom In   Zoom Out

ccept terms

unicate tance tomer

Review documentation vs client request

---

5 Click here to select the entered systems from drop down menu

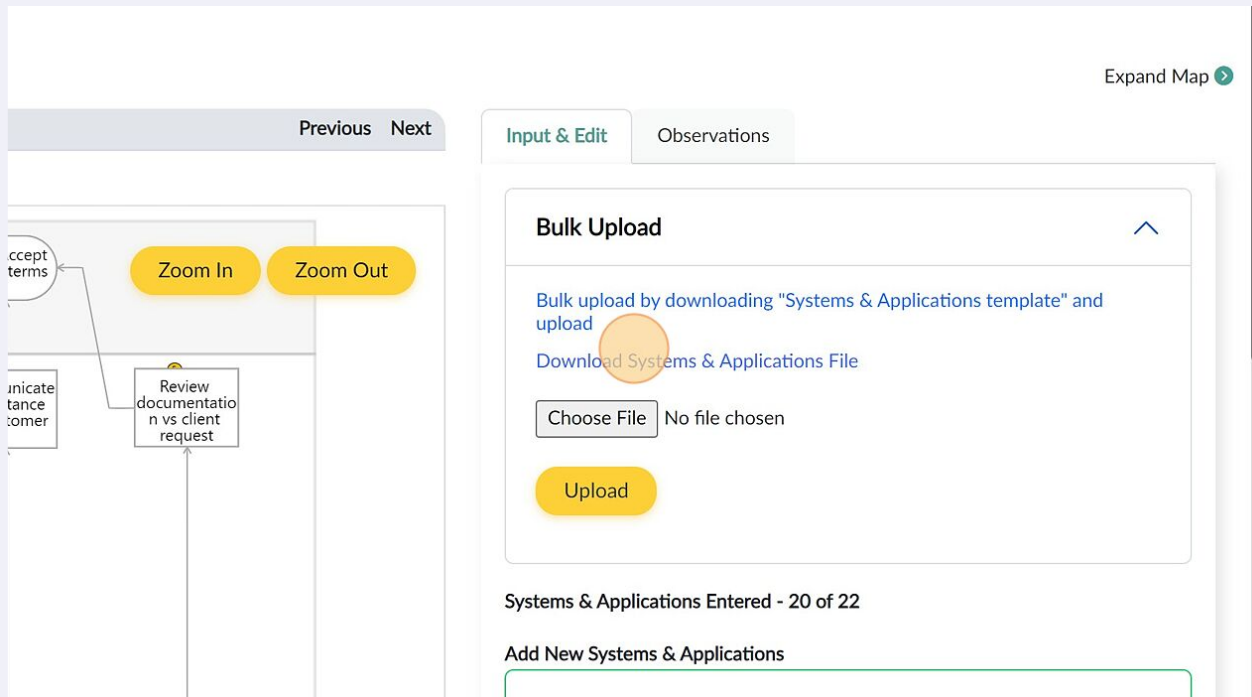Systems & Applications Entered - 20 of 22

Add New Systems & Applications

Client   ⌃

Activity	Systems & Applications
New account or account renewal	Customer Portal ✕ Excel ✕ ⌄
Send credit application and information	Customer Portal ✕ Excel ✕ ⌄
END: Receive reject letter	Customer Portal ✕ epsilon ✕ ⌄
END: Accept credit terms	Outlook ✕ ⌄

unicate tance tomer

Review documentation vs client request

Approve documentation contract

6 Alternatively, you can Excel file to upload information. Click "Bulk Upload"

More

Expand Map ›

Previous   Next

Input & Edit   Observations

Bulk Upload   ⌄

Systems & Applications Entered - 20 of 22

Add New Systems & Applications

Client   ⌃

account renewal

Zoom In   Zoom Out

ccept terms

unicate tance tomer

Review documentatio n vs client request

---
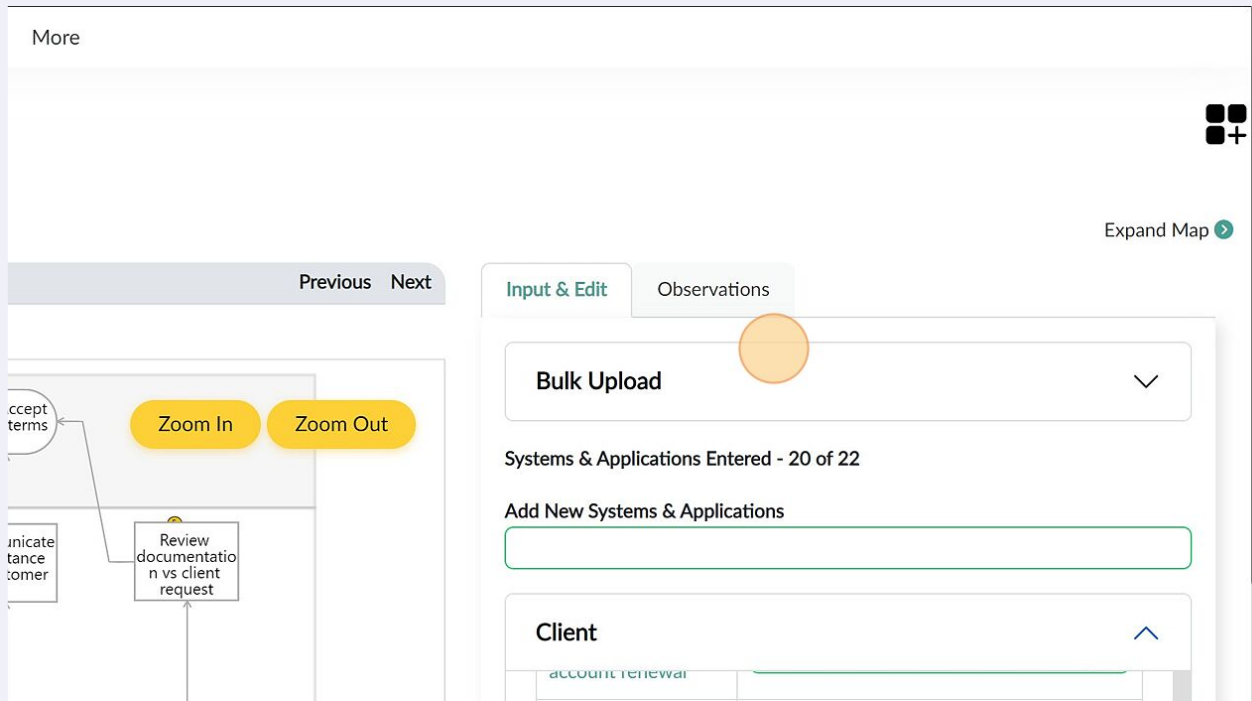
7 Click "Download Systems & Applications File" and update the information in the file

Expand Map ›

Previous   Next

Input & Edit   Observations

Bulk Upload   ⌃

Bulk upload by downloading "Systems & Applications template" and upload

Download Systems & Applications File

Choose File   No file chosen

Upload

Systems & Applications Entered - 20 of 22

Add New Systems & Applications

Zoom In   Zoom Out

ccept terms

unicate tance tomer

Review documentatio n vs client request

8 choose the file from your system

Previous   Next

Input & Edit   Observations

Bulk Upload   ∧

Bulk upload by downloading "Systems & Applications template" and upload

Download Systems & Applications File

[Choose File] No file chosen

[Upload]

Systems & Applications Entered - 20 of 22

Add New Systems & Applications

D: Accept edit terms

[Zoom In] [Zoom Out]

mmunicate ceptance customer

Review documentatio n vs client request

---

9 Click "Upload"

Bulk Upload   ∧

Bulk upload by downloading "Systems & Applications template" and upload

Download Systems & Applications File

[Choose File] No file chosen

[Upload]

Systems & Applications Entered - 20 of 22

Add New Systems & Applications

Client   ∧

account renewal

D: Accept edit terms

[Zoom In] [Zoom Out]

mmunicate ceptance customer

Review documentatio n vs client request

Approve documentatio n contract

10 Click "Observations" to review all the entered information and make corrections where necessary

More

Expand Map ➤

Previous Next

Input & Edit Observations

Zoom In Zoom Out

Bulk Upload ∧

Review
documentatio
n vs client
request

Bulk upload by downloading "Systems & Applications template" and upload

Download Systems & Applications File

Choose File No file chosen