

Oracle Banking Digital Experience

Credit Facility Originations User Manual
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ORACLE®

Credit Facility Originations User Manual
December 2019

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1. Preface

1.1 Intended Audience

This document is intended for the following audience:

- Customers
- Partners

1.2 Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc>.

1.3 Access to Oracle Support

Oracle customers have access to electronic support through My Oracle Support. For information, visit

<http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info> or visit

<http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs> if you are hearing impaired.

1.4 Structure

This manual is organized into the following categories:

Preface gives information on the intended audience. It also describes the overall structure of the User Manual.

Introduction provides brief information on the overall functionality covered in the User Manual.

The subsequent chapters provide information on transactions covered in the User Manual.

Each transaction is explained in the following manner:

- Introduction to the transaction
- Screenshots of the transaction
- The images of screens used in this user manual are for illustrative purpose only, to provide improved understanding of the functionality; actual screens that appear in the application may vary based on selected browser, theme, and mobile devices.
- Procedure containing steps to complete the transaction- The mandatory and conditional fields of the transaction are explained in the procedure.

If a transaction contains multiple procedures, each procedure is explained. If some functionality is present in many transactions, this functionality is explained separately.

1.5 Related Information Sources

For more information on Oracle Banking Digital Experience Release 19.2.0.0.0, refer to the following documents:

- Oracle Banking Digital Experience Licensing Guide
- Oracle Banking Digital Experience Installation Manuals

2. Transaction Host Integration Matrix

Legends

NH	No Host Interface Required.
✓	Pre integrated Host interface available.
×	Pre integrated Host interface not available.

Sr. No	Transaction / Function Name	Oracle Banking Credit Facility Process Management System (OBCFPM) 14.3.0.0.0	Oracle FLEXCUBE Enterprise Limits and Collateral Management (ELCM) 14.3.0.0.0
1	Apply for New Facility	✓	NH
2	Amend Facility	✓	NH
3	Collateral Evaluation	✓	NH
4	Collateral Revaluation	✓	NH
3	Application Tracker	✓	NH

[Home](#)

3. Apply For New Facility

Using this option, corporate customers can apply for a new credit facility by providing the information about their funding requirement, collateral details and uploading the supporting documents. Credit Facility along with its multiple child lines can be applied in a single application.

Credit Facility application goes through various stages starting from applying for a facility till sanction of facility.

On submission of Credit Facility Application from OBDX side, the request is sent to the mid office/back office system for further processing. Bank staff can view and process the application using back office or mid office systems integrated with OBDX.

Corporates can track the status of the facility applications using Application Tracker available within OBDX.

Note:

1) Corporate Credit Facility Management module support is currently not supported for mobile and tablet devices.

2) A new Facility can be applied by only those Corporates who have an existing Liability ID (maintained in ELCM application).

Prerequisites:

- Party preference is maintained
- Corporate users are created
- Approval rule set up for corporate user to perform the actions

How to reach here:

Credit Facility Management – Overview > Quick Links > Apply for New Facility
OR

Toggle Menu > Credit Facility Management > Apply for New Facility

To apply for a new facility:

1. Navigate to the **Facility Application** screen. The **Facility Application – Summary** page appears.

Facility Application – Summary Page

Credit Facility Application summary page displays the summary of all steps involved in applying a facility along with the completion status of each step.

Following are the steps that are involved for applying a credit facility:

- **Facility Requirements:** In this step, the user needs to enter the facility requirement like facility amount, duration for which the credit facility is needed, category of the facility etc.
- **Collaterals:** This section lists all the collaterals mapped to the party. The user can add a new collateral by entering the required information like collateral type, description, purpose etc. in the Add Collaterals form.
- **Upload Documents:** This section lists all the documents, which are required to be submitted as part of facility application and the option to upload the document.

Screen also shows the overall facility application completion status with a progress bar. User can start filling up the application in any sequence i.e. user can click on any step and fill in the details. Application can be submitted for processing, only after filling the mandatory information required as a part of each step.

The screenshot displays the 'Facility Application' summary page on the Futura Bank portal. At the top, there is a navigation bar with the Futura Bank logo, a search icon, and a user profile for 'Sonal Agarwal' with the last login time '23 Dec 10:47 AM'. The main content area features a progress bar indicating '100% Remaining' for the 'Facility initiation for Sunrise Coffee'. Below the progress bar, there are three steps listed with icons and descriptions:

- Facility Requirements:** Let us know the amount and duration for credit facility. A 'Get Started' button is available.
- Collaterals:** View your existing collaterals and add new collaterals if required. A 'Get Started' button is available.
- Upload Documents:** Submit supporting documents. A 'Get Started' button is available.

At the bottom of the main content area, there are three buttons: a red 'Submit' button, a dark grey 'Cancel' button, and a 'Back' link.

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Field Description

Field Name	Description
Progress Bar	The current status of the Credit Facility application completion is displayed graphically with the help of a progress bar.
Facility Requirements	The user clicks this link to define the facility related requirements.

Field Name	Description
Collaterals	The user clicks this link to define the collateral related requirements.
Upload Documents	The user clicks this link for uploading the documents.

2. Click the **Facility Requirements** card. The **Facility Application** screen appears.

Facility Application

ATM/Branch UBS 14.3 AT3 Branch

futura bank Welcome, Murphy Maker Last login 20 Nov 10:16 AM

Facility Application

Home / Facility Requirements

Please complete the step by clicking on continue at the respective stage.
Enter your facility requirements, so as to serve you better

Sunrise Coffee

Multiple facilities and sub facilities requirement can be added here

+ Add Facility

Continue Save as Draft Cancel Back

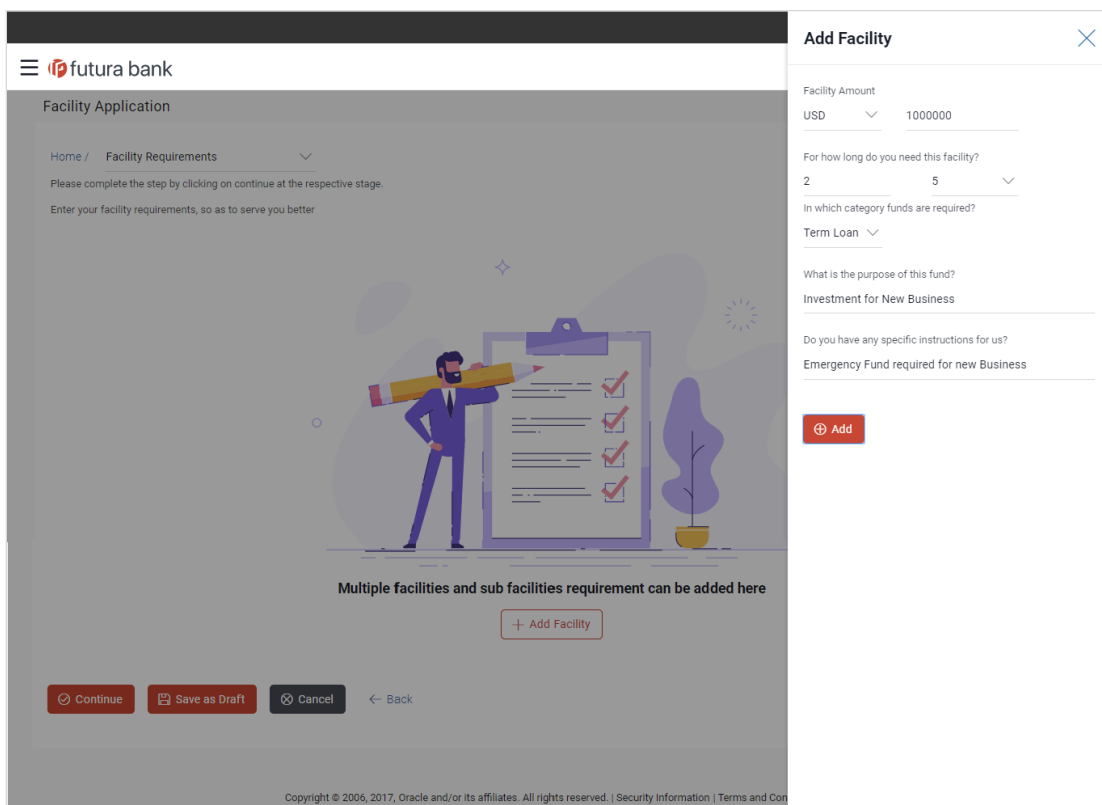
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Field Description

Field Name	Description
Navigating path to the step	Select the step from the drop- down list to navigate to the step in which details are to be filled for the facility application. OR Click the Home link to navigate back to facility application summary page.
Party Name	Displays the party name for whom the facility is to be applied.

3. Click **Add Facility**. The **Add Facility** overlay screen appears.

Facility Requirements - Add Facility



Field Description

Field Name	Description
------------	-------------

Add Facility Overlay

Facility Currency The currency in which facility is to be applied.

Facility Amount The amount for which the facility is to be applied.

For how long do you need this facility? The tenure for the facility in 'Year' and 'Months'.

In which category funds are required? The facility category under which facility is to be applied.

What is the purpose of this fund? The purpose for applying the facility.

Field Name	Description
Do you have any specific instructions for us?	The remarks/ instructions that needs to be communicated to the bank.
4.	From the Currency list, select the appropriate currency for the facility.
5.	In the Amount field, enter the amount for the facility.
6.	From the Year and Month list, select the tenure for the facility.
7.	From the Funding Type list, select the appropriate category for the facility.
8.	In the Purpose field, enter the purpose for applying for the facility.
9.	In the Specific Instructions field, enter the specific instructions to be given to the bank, if any.
10.	Click Add . The facility requirement details gets added in a card form in the Facility Requirement Details screen.

Facility Application - Facility Requirement Details

This screen will display the facility requirements entered by the user. Also, the user can add multiple sub facilities under the main credit facility from this screen.

ATM/Branch UBS 14.3 AT3 Branch

futura bank

Welcome, Murphy Maker
Last login 21 Nov 03:28 PM

Facility Application

Home / Facility Requirements

Sunrise Coffee

Please complete the step by clicking on continue at the respective stage.
Enter your facility requirements, so as to serve you better

Facility Requirement Details




Term Loan
\$100,000.00 2 years 5 months
Investment for new Business
Emergency fund required for New Business

Continue Save as Draft Cancel Back

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Field Description

Field Name	Description
Navigating path to the step	Select the step from the drop- down list to navigate to the step in which details are to be filled for the facility application. OR Click the Home link to navigate back to facility application summary page.
Party Name	Displays the party name for which the facility is to be applied.
Facility Requirement Details	The facility details such as facility currency, amount, purpose and tenure as entered by user will be displayed in a card form.

11. Click  and then click **Add Sub Facility** to add the sub facility details, if required. The **Add Sub Facility** overlay screen appears.
OR
- Click  and then click **Edit Facility** to edit the filled in facility requirements. The **Edit Facility Details** overlay screen appears.
OR
- Click  and then click **Remove Facility** to remove the added facility.
OR
- Click **Continue** to go to the next step.
OR
- Click **Save as Draft** to save the application as a draft. The application gets saved as a draft prompting the user to save the application with the draft name. (For more information, refer [Save as Draft](#) section).
OR
- Click **Cancel** to cancel the transaction and navigate to the **Dashboard** Screen.
OR
- Click **Back** to navigate back to the previous screen.

Note: Once the application is saved as draft, the user will be able to resume the application from Application Tracker.

Facility Requirements - Add Sub Facility

The screenshot shows a mobile application interface for 'futura bank'. The main screen is titled 'Facility Application' and contains a 'Facility Requirement Details' card with the following information: Term Loan, \$1,000,000.00, 2 years 5 months, Investment for new Business, and Emergency fund required for New Business. At the bottom of the main screen are buttons for 'Continue', 'Save as Draft', 'Cancel', and 'Back'. An 'Add Sub Facility' overlay is positioned on the right side, containing the following fields: 'Facility Amount' (USD, 150000), 'For how long do you need this facility?' (2 years, 1 month), 'In which category funds are required?' (Term Loan), 'What is the purpose of this fund?' (investment), and 'Do you have any specific instructions for us?' (Emergency Fund for Business). An 'Add' button is located at the bottom of the overlay.

Field Description

Field Name	Description
------------	-------------

Add Sub Facility Overlay

Facility Currency The currency in which sub facility is to be applied.

Facility Amount The amount for which the sub facility is to be applied.

For how long do you need this facility? The tenure for the sub facility in 'Year' and 'Months'.


In which category funds are required? The facility category under which sub facility is to be applied.

What is the purpose of this fund? The purpose for applying the sub facility.


Do you have any specific instructions for us? The remarks/ instructions that needs to be communicated to the bank.

12. Enter the relevant information, as required.
13. Click **Add**. The sub facility requirement details gets added in a card form.
14. Click **Continue** to go to the next step. Collaterals details page with all the collaterals mapped to the party appears.

OR

Click  and then click **Add Sub Facility** to add more sub facility details, if required. The **Add Sub Facility** overlay screen appears.

OR

Click  and then click **Edit Facility** to edit the filled in facility requirements. The **Edit Facility Details** overlay screen appears.

OR

Click  and then click **Remove Facility** to remove the added sub facility.

OR

Click **Save as Draft** to save the application as a draft. The application gets saved as a draft prompting the user to save the application with the draft name. (For more information, refer [Save as Draft](#) section.)

OR

Click **Cancel** to cancel the transaction and navigate to the **Dashboard** Screen.

OR

Click **Back** to navigate back to the previous screen.

Note: The user can add sub facilities up to seven levels.

Facility Application - Collaterals

ATM/Branch UBS 14.3 AT3 Branch

Welcome, Murphy Maker
Last login 21 Nov 03:39 PM

Facility Application

Home / Collaterals

Please complete the step by clicking on continue at the respective stage.

Your existing collaterals are listed below, you can add new collaterals if required + Add Collaterals

Collaterals	Collateral Amount	Utilized Amount	Available Amount	Revision Date
AUDICAR	\$3,100,000.00	\$1,325,870.00	\$1,774,130.00	16 Mar 2019
FLAT1 new flat at carter road	\$5,400,000.00	\$162,000.00	\$5,238,000.00	16 Mar 2019
GEBERICC generic collateral	\$5,000.00	\$1,256.00	\$3,744.00	16 Mar 2019
GUARANTEECER Guarantee certificate from bank	\$2,400,000.00	\$48,000.00	\$2,352,000.00	16 Mar 2019
GUARANTEECERM Guarantee certificate from bank new	\$2,400,000.00	\$48,000.00	\$2,352,000.00	16 Mar 2019
HEAVYVEHICAL Vehical	\$10,000,000,000.00	\$2,080,000,000.00	\$7,920,000,000.00	01 Mar 2019
LAND Property at remote Location near mumbai	\$10,000,000,000.00	\$4,240,900,000.00	\$5,759,100,000.00	01 Mar 2019
MISASSETS miscellaneous assets	\$2,000,000.00	\$100,000.00	\$1,900,000.00	16 Mar 2019
PACKAGINGMACHINE Box Packing Machine Arm	\$100,000,000.00	\$71,700,000.00	\$28,300,000.00	01 Mar 2019
PRINTINGMACHINE	\$1,000,000,000.00	\$712,990,000.00	\$287,010,000.00	01 Mar 2019
ROADROLLER road roller machine	\$28,000,000.00	\$11,384,000.00	\$16,616,000.00	16 Mar 2019
TCSSHARE share of tcs	\$18,000.00	\$180.00	\$17,820.00	16 Mar 2019
TCSSHARE1 share of tcs	\$18,000.00	\$180.00	\$17,820.00	16 Mar 2019

Continue
Save as Draft
Cancel
← Back

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Field Description

Field Name	Description
Navigating path to the step	Select the step from the drop-down list to navigate to the step in which details are to be filled for the facility application. OR Click the Home link to navigate back to facility application summary.
Party Name	Displays the party name for whom the facility is to be applied.
Collaterals	All the collaterals linked to the party gets displayed on this screen. User can also request for addition of new collateral from this screen.
Collateral ID	Collateral ID of the facility.
Collateral Description	The description of the collateral.
Collateral Amount	This collateral amount evaluated against the pledged collateral.
Utilized Amount	The total utilized amount of the collateral.
Available Amount	The current available amount for collateral.
Revision Date	The revision date of the collateral.

15. Click **Add Collateral** to add the collateral details. The **Add Collateral** overlay screen appears.
OR
Click **Continue** to go to the next step.
OR
Click **Save as Draft** to save the application as a draft. The application gets saved as a draft prompting the user to save the application with the draft name. (For more information, refer [Save as Draft](#) section.)
OR
Click **Cancel** to cancel the transaction and navigate to the **Dashboard** Screen.
OR
Click **Back** to navigate back to the previous screen.

Facility Application - Add Collaterals

Facility Application

Home / Collaterals

Please complete the step by clicking on continue at the respective stage.

Your existing collaterals are listed below, you can add new collaterals if required

Collaterals

Collateral Name	Collateral Amount	Utilized Amount	Available Amount	Revision Date
AUDICAR	\$3,100,000.00	\$1,325,870.00	\$1,774,130.00	
FLAT1 new flat at carter road	\$5,400,000.00	\$162,000.00	\$5,238,000.00	
ROADROLLER road roller machine	\$28,000,000.00	\$11,384,000.00	\$16,616,000.00	16 Mar 2019
TCS SHARE share of tcs	\$18,000.00	\$180.00	\$17,820.00	16 Mar 2019
TCS SHARE1 share of tcs	\$18,000.00	\$180.00	\$17,820.00	16 Mar 2019

Add Collaterals

Please specify collateral Type
Fund

What would you describe this collateral as?
Fund Deposits with Nationalised Bank

What is the estimated value of this collateral?
USD 2100000

What is the purpose of this collateral?
Pledged for New Business Facility

Any other comments
Secured Collateral

Add

Continue Save as Draft Cancel Back

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Field Description

Field Name	Description
Please specify collateral type	The collateral type like Plant & Machinery, Vehicle, Stocks etc.
What would you describe this collateral as	The description of the collateral.
What is the estimated value of this collateral?	The estimated value of the collateral with selection of currency.
What is the purpose of this collateral?	The purpose for the new collateral.

Field Name	Description
Any other comments?	The remarks/ instructions that needs to be communicated to the bank, if any.

16. From the **Collateral type** list, select the appropriate collateral type.
17. In the **Collateral description** field, enter the description of the collateral.
18. From the **Currency** list, select the appropriate currency for entering the estimated value of collateral.
19. In the **Collateral estimated value** field, enter the collateral amount.
20. In the **Purpose** field, enter the purpose for collateral.
21. In the **Comments** field, enter the specific instructions to be given to the bank, if any.
22. Click **Add**. The new collateral is added as a new card on the **Collaterals Details** screen.

Facility Application - Collaterals - New Collateral

ATM/Branch UBS 14.3 AT3 Branch

Welcome, Murphy Maker
Last login 21 Nov 03:39 PM

Facility Application

Home / Collaterals

Please complete the step by clicking on continue at the respective stage.

Your existing collaterals are listed below, you can add new collaterals if required

[Add Collaterals](#)

Collaterals

Fund Deposits with Nationalised Bank		Estimated Value	Purpose
Type	Currency		
FNDS	USD	2100000	Pledged for New Business Facility

Collateral Amount	Utilized Amount	Available Amount	Revision Date
\$3,100,000.00	\$1,325,870.00	\$1,774,130.00	16 Mar 2019

Collateral Amount	Utilized Amount	Available Amount	Revision Date
\$5,400,000.00	\$162,000.00	\$5,238,000.00	16 Mar 2019

Collateral Amount	Utilized Amount	Available Amount	Revision Date
\$5,000.00	\$1,256.00	\$3,744.00	16 Mar 2019

Collateral Amount	Utilized Amount	Available Amount	Revision Date
\$2,400,000.00	\$48,000.00	\$2,352,000.00	16 Mar 2019

Collateral Amount	Utilized Amount	Available Amount	Revision Date
\$2,400,000.00	\$48,000.00	\$2,352,000.00	16 Mar 2019

Collateral Amount	Utilized Amount	Available Amount	Revision Date
\$10,000,000,000.00	\$2,080,000,000.00	\$7,920,000,000.00	01 Mar 2019

Collateral Amount	Utilized Amount	Available Amount	Revision Date
\$10,000,000,000.00	\$4,240,900,000.00	\$5,759,100,000.00	01 Mar 2019

Collateral Amount	Utilized Amount	Available Amount	Revision Date
\$2,000,000.00	\$100,000.00	\$1,900,000.00	16 Mar 2019

Collateral Amount	Utilized Amount	Available Amount	Revision Date
\$100,000,000.00	\$71,700,000.00	\$28,300,000.00	01 Mar 2019

Collateral Amount	Utilized Amount	Available Amount	Revision Date
\$1,000,000,000.00	\$712,990,000.00	\$287,010,000.00	01 Mar 2019

Collateral Amount	Utilized Amount	Available Amount	Revision Date
\$28,000,000.00	\$11,384,000.00	\$16,616,000.00	16 Mar 2019

Collateral Amount	Utilized Amount	Available Amount	Revision Date
\$18,000.00	\$180.00	\$17,820.00	16 Mar 2019

Collateral Amount	Utilized Amount	Available Amount	Revision Date
\$18,000.00	\$180.00	\$17,820.00	16 Mar 2019


Continue
Save as Draft
Cancel

← Back


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23. Click **Continue** to go to the next step. The **Facility Application - Upload Documents** screen to upload the documents appears.

OR

Click  and then click **Edit** to edit the details of newly added collateral. The **Add Collateral** overlay screen appears in the editable form.

OR

Click  and then click **Remove** to remove the newly added collateral.

OR

Click **Add Collaterals**, if you want to add more collaterals.

OR

Click **Load More Collaterals**, to load more collaterals.

OR

Click **Save as Draft** to save the application as a draft. The application gets saved as a draft, prompting the user to save the application with the draft name. (For more information, refer [Save as Draft](#) section.)

OR

Click **Cancel** to cancel the transaction and navigate to the **Dashboard** Screen.

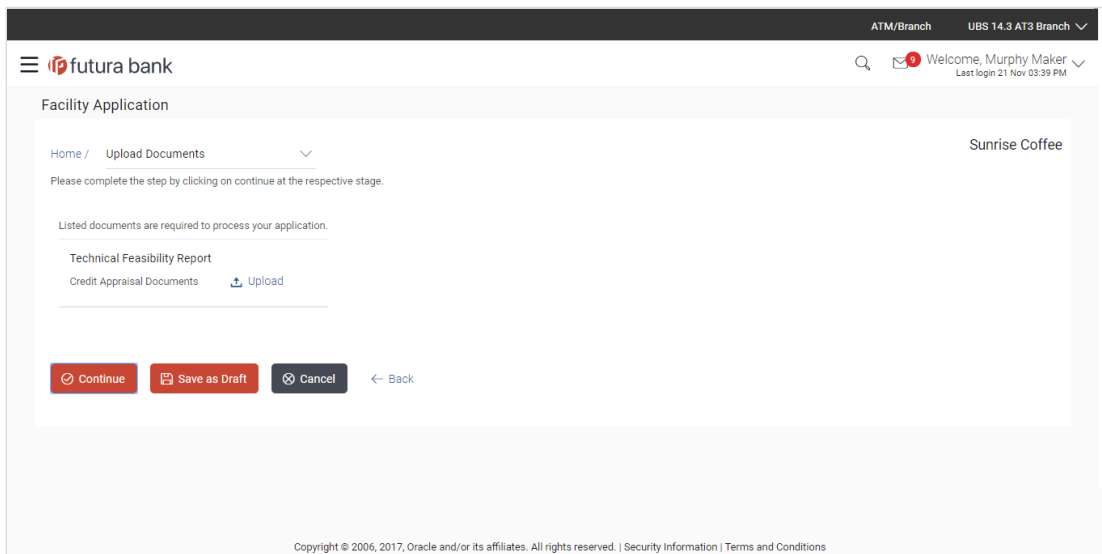
OR

Click **Back** to navigate back to the previous screen.

Facility Application - Upload Documents


Following screen is shown when user clicks on 'Upload Documents' step from the 'Facility Application Summary Page' or on accessing the step from breadcrumb option available as a part of each step details screen or by clicking on continue on the collateral details page.

As a part of this step, corporate user can see the list of documents that needs to be submitted for applying a facility. User can upload the documents and proceed with the facility application. The list of documents displayed here are fetched from integrated mid-office/back office application.

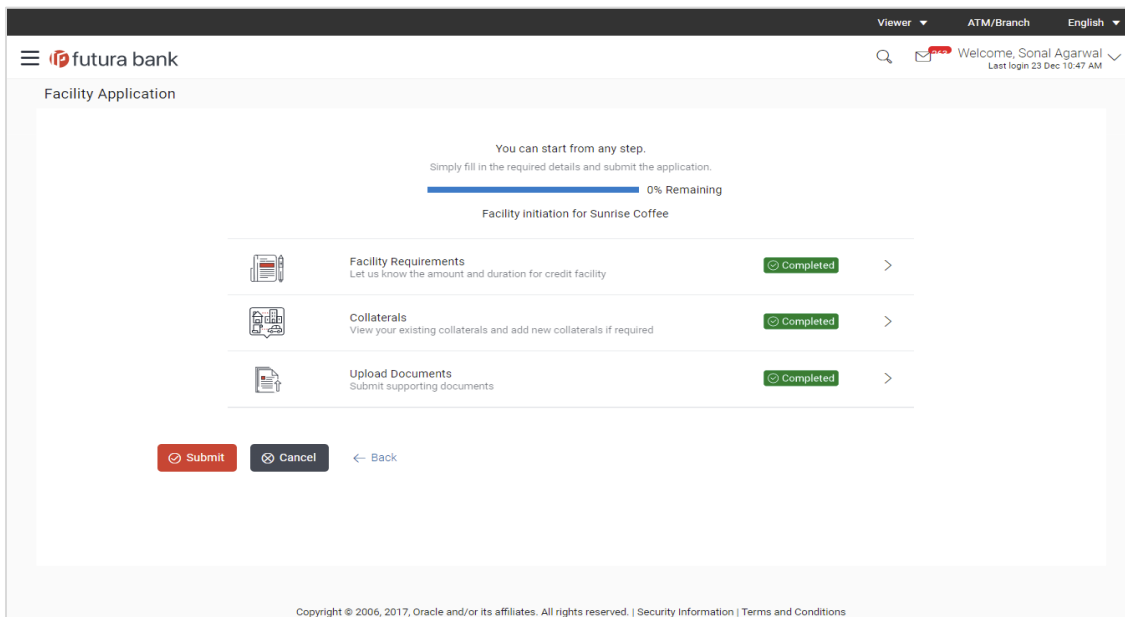


Field Description

Field Name	Description
Navigating path to the step	Select the step from the drop- down list to navigate to the step in which details are to be filled for the facility application. OR Click the Home link to navigate back to facility application
Party Name	Displays the party name for whom the facility is to be applied.
Document Name	The document that the corporate is expected to submit as a part of application. The list of the documents is fetched from the mid-office based on the selected product type.

24. Click  **Upload** to browse and upload the required document to process the application.
25. Select the appropriate file to be uploaded, and click **Open** to upload the documents.
26. Click **Continue**. The **Facility Application** screen displaying completion of all the three steps to apply for the facility appears.
OR
Click **Save as Draft** to save the application as a draft. The application gets saved as a draft prompting the user to save the application with the draft name. (For more information, refer [Save as Draft](#) section.)
OR
Click **Cancel** to cancel the transaction and navigate to the **Dashboard** Screen.
OR
Click **Back** to navigate back to the previous screen.

Facility Application



The screenshot displays the 'Facility Application' interface. At the top, there's a navigation bar with 'futura bank' logo, a search icon, and a user greeting 'Welcome, Sonal Agarwal'. Below the header, the main content area shows a progress indicator '0% Remaining' for 'Facility initiation for Sunrise Coffee'. Three steps are listed as completed: 'Facility Requirements', 'Collaterals', and 'Upload Documents'. At the bottom, there are three buttons: 'Submit' (red), 'Cancel' (grey), and 'Back' (blue).

27. Click **Submit**.

OR

Click the **link** against each card to view the **Facility Requirements/ Collaterals/ Upload Documents** section details.

OR

Click **Cancel** to cancel the operation and to navigate back to 'Dashboard'.

OR

Click **Back** to navigate back to the previous screen.

28. The **Facility Application - Review** screen appears.

Facility Application - Review

The screenshot displays the 'Facility Application - Review' interface. At the top, the Futura Bank logo and user information 'Welcome, Nick Fury' are visible. The main content area is titled 'Collateral Evaluation' and includes a 'REVIEW' step indicator. A message states: 'You have initiated a request for Facility Origination. Please review the details before you confirm!'. Below this, three sections are listed, each with a 'Show More' button:

- Facility Requirements:** Shows 'Funded \$10,000,000.00 | 2 years 0 months', 'Facility for new Business', and 'No'.
- Collaterals:** A table with columns for Type, Currency, Estimated Value, and Purpose. One entry is shown: 'Printing Machine' (Type: MCHN, Currency: USD, Estimated Value: 1000000, Purpose: Pledge for New Business).
- Upload Documents:** Shows 'Technical Feasibility Report' (Tech Doc.pdf).


At the bottom, the 'Terms and conditions' section has a checked checkbox for 'I agree to the terms and conditions'. Navigation buttons include 'Confirm', 'Cancel', and 'Back'. A footer contains copyright information: 'Copyright © 2006, 2017, Oracle and/or its affiliates. All rights reserved. | Security Information | Terms and Conditions'.

29. Click the **See Terms and Conditions** link to view the terms and conditions.

30. Select **I agree to the Term & Conditions** check box to accept the terms and conditions.

31. Verify the details, and click **Confirm**.

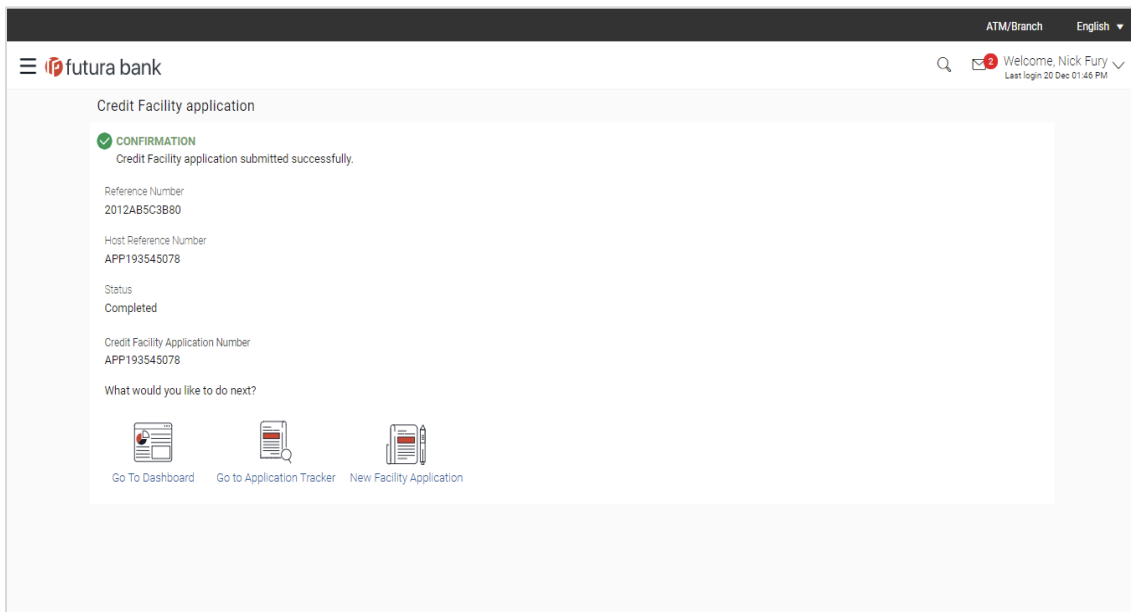
OR

Click  against the section that you want to edit. The screen appears in editable form.

OR

- Click **Show More** to view the **Facility Requirements/ Collaterals/ Upload Documents** section details.
- OR
- Click **Cancel** to cancel the operation and to navigate back to 'Dashboard'.
- OR
- Click **Back** to navigate back to the previous screen.
32. On successful submission, confirmation message for initiating the facility request appears along with the application reference number to track the status of your application.
- Click the **Back to Dashboard** link to go to Dashboard screen.
- OR
- Click the **Application Tracker** link to track your facility application.

Facility Application - Confirm



[Home](#)

4. Amend Facility

This option enables the corporate user to request for changes in an existing credit facility. These amendments could be with respect to enhancement of the limits, extension of tenure, addition of new collateral or upload of new documents.

Similar to New Facility origination, Facility Amendment also has various stages, using the OBDX platform user can only request for modification in his/her existing facility

On submission of Amendment of Credit Facility Application from OBDX side, the request is sent to the bank for further processing. Bank staff can view and process the application using back office or mid office systems integrated with OBDX.

Corporates can track the status of the amendment applications using Application Tracker available within OBDX.

Prerequisites:

- Party preference is maintained
- Corporate users are created
- Approval rule set up for corporate user to perform the actions

How to reach here:

Credit Facility Management – Overview > Quick Links > Amend Facility

OR

Toggle Menu > Credit Facility Management > Amend Facility

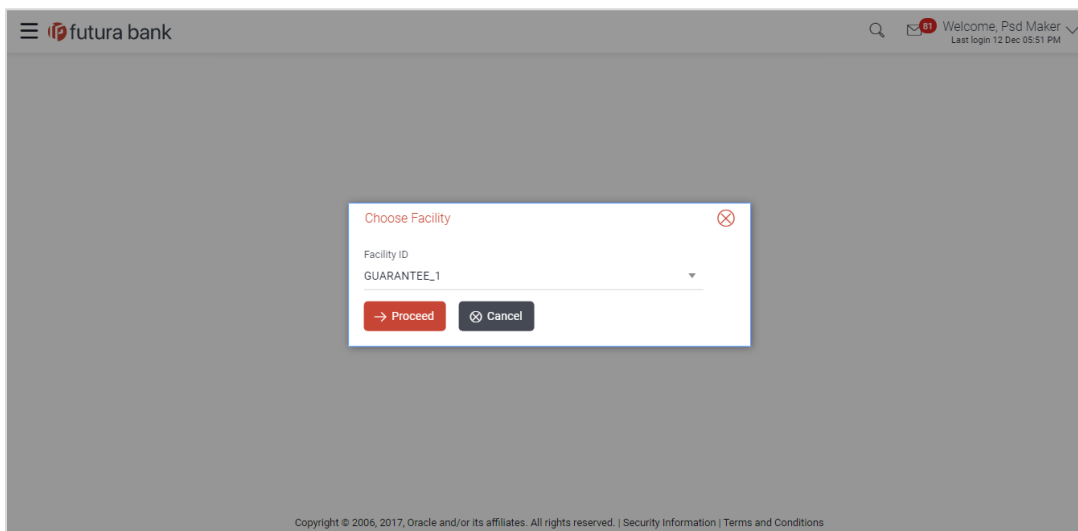
OR

Toggle Menu > Credit Facility Management > Credit Facility > Facility Details > Amend Facility

To modify the details of an existing facility: (in case the user has not clicked on Amend Facility from the Facility details screen)

1. Click the **Amend Facility** option (from toggle menu or from Quick links). A pop up having option to select the Facility ID appears.

Amend Facility - Select Facility ID



Field Description

Field Name	Description
Facility ID	List of all the Facility IDs mapped to the corporate.

- From the **Facility ID** field, select the appropriate facility ID.
- Click **Proceed**. The **Facility Application – Amendment** screen appears.
OR
Click **Cancel** to cancel the transaction and navigate to the **Dashboard** Screen.

Facility Application – Summary Page

Credit Facility Amendment Application summary page displays the summary of all steps involved in modification of a facility.

Following are the changes that the user can modify in an existing facility:

- Facility Amount
- Facility Tenure
- Addition of a New Sub-facility
- Addition of a new Collateral
- Upload of additional documents

User can select any of the step for modification from the home page, i.e. user can click on any step and modify the details.

The screenshot displays the 'Amend Facility' application summary page on the Futura Bank portal. The page header includes the Futura Bank logo, a search icon, and user information: 'Welcome, Sonal Agarwal' with a last login of '23 Dec 10:47 AM'. The main content area features a progress bar indicating '100% Remaining' for the application 'GUARANTEE_1 of Sunrise Coffee'. Below the progress bar, there are three steps listed with icons and descriptions:

- Facility Requirements**: Let us know the amount and duration for credit facility. Includes a 'Get Started' button.
- Collaterals**: View your existing collaterals and add new collaterals if required. Includes a 'Get Started' button.
- Upload Documents**: Submit supporting documents. Includes a 'Get Started' button.

At the bottom of the page, there are three buttons: a red 'Submit' button, a grey 'Cancel' button, and a 'Back' button with a left-pointing arrow. The footer contains the copyright notice: 'Copyright © 2006, 2017, Oracle and/or its affiliates. All rights reserved. | Security Information | Terms and Conditions'.

Field Description

Field Name	Description
Facility Requirements	The user clicks this link to modify the facility amount and tenure.
Collaterals	The user clicks this link to add a new collateral.
Upload Documents	The user clicks this link for uploading the documents.

4. Click the **Facility Requirements** card. The **Facility Application** screen appears.

Facility Application - Facility Requirement Details

AM/BRANCH English

futura bank Welcome, Psd Maker Last login 12 Dec 05:51 PM

Amend Facility

Home / Facility Requirements

Please complete the step by clicking on continue at the respective stage.
Enter your facility requirements, so as to serve you better

Facility Requirement Details

Funding Type	Revolving Line	Sanctioned Amount	Utilized Amount	Available Amount	Expiry Date	23.08 % Utilized
GUARANTEE	No	£433,270.00	£100,000.00	£333,270.00	17 Apr 2020	


Continue Save as Draft Cancel Back

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Field Description

Field Name	Description
Navigating path to the step	Select the step from the drop-down list whose details are to be filled for the facility application. OR Click the Home link to navigate back to facility application summary page.
Party Name	Displays the party name for whom the facility is being amended.
Facility Requirement Details	This card shows the details of the selected facility.
Facility ID	ID of the Credit Facility selected for amendment.

Field Name	Description
Funding Type	The purpose or the facility category under which the facility has been opened. For e.g. Term Loan, Working Capital Finance, Over draft, etc.
Revolving Line	This field displays if the facility is revolving or not.
Sanctioned Amount	The total limit amount sanctioned for the facility.
Utilized Amount	The amount utilized for the facility.
Available Amount	The current available amount for the facility.
Expiry Date	The date on which facility expires.
% Utilized	Displays the percentage utilization of the facility in a line graph.

5. Click  and then click **Edit Facility** to modify the details of an existing facility. The **Edit Facility Details** overlay screen appears.

OR

Click  and then click **Add Sub Facility** to add the details for a sub facility under the selected facility. The **Add Sub Facility** overlay screen appears.

OR

Click **Continue** to go to the next step.

OR

Click **Save as Draft** to save the application as a draft. The application gets saved as a draft prompting the user to save the application with the draft name. (For more information, refer [Save as Draft](#) section)

OR

Click **Cancel** to cancel the transaction and navigate to the Dashboard Screen.

OR

Click **Back** to navigate back to the previous screen.

Edit Facility Details

Home / Facility Requirements

Please complete the step by clicking on continue at the respective stage.
Enter your facility requirements, so as to serve you better

Facility Requirement Details

Funding Type	Revolving Line	Sanctioned Amount	Utilized Amount	Available Amount	Expiration
GUARANTEE	Yes	£433,270.00	£100,000.00	£333,270.00	17 A

GUARANTEE_1

Facility Amount
USD 433270

For how long do you need this facility?
1 1

Do you have any specific instructions for us?
Specify your instructions

Update

Continue Save as Draft Cancel Back

Field Description

Field Name	Description
------------	-------------

Edit Facility Details

Facility Currency The currency in which facility was applied originally is displayed.

Facility Amount The amount for which the facility is applied.

For how long do you need this facility? The tenure for the facility in 'Year' and 'Months'.

Do you have any specific instructions for us? The remarks/ instructions that needs to be communicated to the bank.

- In the **Currency** list, system displays the currency in which the facility was originally applied.
- In the **Amount** field, modify the amount for the facility, if required.
- From the **Year** and **Month** list, modify the tenure for the facility if required.
- In the **Specific Instructions** field, modify the specific instructions to be given to the bank, if any.
- Click **Update**. The **Facility Requirement Details** screen gets updated and facility details will be saved and appear in a card form, with old and newly edited details.

Amend Facility - Facility Requirement Details

ATM/Branch English

futura bank Welcome, Pad Maker Last login 12 Dec 05:51 PM

Amend Facility

Home / Facility Requirements

Please complete the step by clicking on continue at the respective stage.
Enter your facility requirements, so as to serve you better

Facility Requirement Details

Funding Type	Revolving Line	Sanctioned Amount	Utilized Amount	Available Amount	Expiry Date	23.08 % Utilized
GUARANTEE	No	£433,270.00	£100,000.00	£333,270.00	17 Apr 2020	<div style="width: 23.08%;"></div>

Amended Details

Facility Amount	Tenure
\$433,270.00	1 years 2 months

Continue Save as Draft Cancel Back

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11. Click **Continue** to go to the next step.

OR

Click **Save as Draft** to save the application as a draft. The application gets saved as a draft prompting the user to save the application with a draft name. (For more information, refer [Save as Draft](#) section).


OR

Click **Cancel** to cancel the transaction and navigate to the **Dashboard** Screen.


OR

Click **Back** to navigate back to the previous screen.

OR

Click  and then click **Add Sub Facility** to add the details for a sub facility under the selected facility. The **Add Sub Facility** overlay screen appears.

OR

Click  and then click **Edit Facility** to modify any other details of an existing facility, if required. The **Edit Facility Details** overlay screen appears.

Add Sub Facility

The screenshot shows the 'Add Sub Facility' overlay on the 'Amend Facility' page. The overlay contains the following fields and values:

- Facility Amount: USD 5000
- For how long do you need this facility?: 2 (Year) 2 (Months)
- In which category funds are required?: Term Loan
- What is the purpose of this fund?: Investment
- Do you have any specific instructions for us?: Fund required for business

The background page shows the 'GUARANTEE_1' details in a table:

Funding Type	Revolving Line	Sanctioned Amount	Utilized Amount	Available Amount	Expiry
GUARANTEE	No	£433,270.00	£100,000.00	£333,270.00	17 A

Buttons at the bottom of the background page include 'Continue', 'Save as Draft', 'Cancel', and 'Back'. The footer contains copyright information: Copyright © 2006, 2017, Oracle and/or its affiliates. All rights reserved. | Security Information | Terms and C

Field Description

Field Name	Description
------------	-------------

Add Sub Facility Overlay

Facility Currency The currency in which sub facility is to be applied.

Facility Amount The amount for which the sub facility is to be applied.

For how long do you need this facility? The tenure for the sub facility in 'Year' and 'Months'.


In which category funds are required? The facility category under which sub facility is to be applied.

What is the purpose of this fund? The purpose for applying the sub facility.


Do you have any specific instructions for us? The remarks/ instructions that needs to be communicated to the bank.

- Enter the relevant information, as required.
- Click **Add**. The sub facility Requirement details gets added in a card form.
- Click **Continue** to go to the next step. Collaterals details page with all the collaterals mapped to the party appears.

OR

Click  and then click **Add Sub Facility** to add more sub facility details, if required. The **Add Sub Facility** overlay screen appears.

OR

Click  and then click **Edit Facility** to amend the facility, if required. The **Edit Facility Details** overlay screen appears.

OR

Click  and then click **Remove Facility** to remove the added sub facility.

OR

Click **Save as Draft** to save the application as a draft. The application gets saved as a draft prompting the user to save the application with the draft name. (For more information, refer [Save as Draft](#) section).

OR

Click **Cancel** to cancel the transaction and navigate to the **Dashboard** Screen.

OR

Click **Back** to navigate back to the previous screen.

Note: The user can add sub facilities up to seven levels.

Facility Application - Collaterals

ATM/Branch English

futura bank Welcome, Pgd Maker Last login 12 Dec 05:51 PM

Amend Facility Sunrise Coffee

Home / Collaterals

Please complete the step by clicking on continue at the respective stage.

Your existing collaterals are listed below, you can add new collaterals if required [Add Collaterals](#)

Collateral	Collateral Amount	Utilized Amount	Available Amount	Revision Date
AUDICAR	\$3,100,000.00	\$1,385,870.00	\$1,714,130.00	16 Mar 2019
COMMBUILDING Commercial building at prime location	\$10,000,000,000.00	\$5,150,000,000.00	\$4,850,000,000.00	16 Mar 2019
FLAT1 new flat at carter road	\$5,400,000.00	\$482,000.00	\$4,918,000.00	16 Mar 2019
PACKAGINGMACHINE Box Packing Machine Arm	\$100,000,000.00	\$71,850,000.00	\$28,150,000.00	01 Mar 2019
PRINTINGMACHINE XEROX machine	\$1,000,000,000.00	\$712,990,000.00	\$287,010,000.00	01 Mar 2019
PRIVATELAND Private land at remote Location	\$90,100,000.00	\$903,000.00	\$29,197,000.00	16 Mar 2019
ROADROLLER road roller machine	\$28,000,000.00	\$11,384,000.00	\$16,616,000.00	16 Mar 2019
TCSHARE share of tcs	\$18,000.00	\$180.00	\$17,820.00	16 Mar 2019
TCSHARE1 share of tcs	\$18,000.00	\$180.00	\$17,820.00	16 Mar 2019

[Continue](#) [Save as Draft](#) [Cancel](#) [Back](#)

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Field Description

Field Name	Description
------------	-------------

Navigating path to the step	Select the step from the drop- down list whose details needs to be filled for the facility modification. OR Click the Home link to navigate back to facility application summary page.
------------------------------------	--

Field Name	Description
Party Name	Displays the party name for whom the facility is to be applied.
Collaterals	
All the collaterals linked to the party gets displayed on this screen. User can also request for addition of new collateral from this screen.	
Collateral ID	Collateral ID of the facility.
Collateral Description	The description of the collateral.
Collateral Amount	The collateral amount evaluated against the pledged collateral.
Utilized Amount	The total utilized amount of the collateral.
Available Amount	The current available amount for collateral.
Revision Date	The revision date of the collateral.

15. Click **Add Collateral** to add the collateral details. The **Add Collateral** overlay screen appears.
OR
Click **Continue** to go to the next step.
OR
Click **Save as Draft** to save the application as a draft. The application gets saved as a draft prompting the user to save the application with the draft name. (For more information, click [Save as Draft.](#))
OR
Click **Cancel** to cancel the transaction and navigate to the Dashboard Screen.
OR
Click **Back** to navigate back to the previous screen.

Facility Application - Add Collaterals

Field Description

Field Name	Description
Please specify collateral type	The collateral type like Plant & Machinery, Vehicle, Stocks etc.
What would you describe this collateral as	The description of the collateral.
What is the estimated value of this collateral?	The estimated value of the collateral with selection of currency.
What is the purpose of this collateral?	The purpose for the new collateral.
Any other comments?	The remarks/ instructions that needs to be communicated to the bank, if any.

16. From the **Collateral type** list, select the appropriate collateral type.
17. In the **Collateral description** field, enter the description of the collateral.
18. From the **Currency** list, select the appropriate currency.
19. In the **Collateral estimated value** field, enter the collateral amount.
20. In the **Purpose** field, enter the purpose for collateral.
21. In the **Comments** field, enter the specific instructions to be given to the bank, if any.
22. Click **Add**. The new collateral is added as a new card on the **Collaterals Details** screen.

Facility Application - Collaterals - New Collateral

ATM/Branch English

futura bank Welcome, Psd Maker Last login 12 Dec 05:51 PM

Amend Facility

Home / Collaterals

Please complete the step by clicking on continue at the respective stage.

Your existing collaterals are listed below, you can add new collaterals if required

[Add Collaterals](#)

Collaterals

Collaterals for starting a new business

Type	Currency	Estimated Value	Purpose
MCHN	USD	4000	Business startup

Collateral Amount	Utilized Amount	Available Amount	Revision Date
\$3,100,000.00	\$1,385,870.00	\$1,714,130.00	16 Mar 2019
COMMBUILDING Commercial building at prime location			
\$10,000,000.00	\$5,150,000.00	\$4,850,000.00	16 Mar 2019
FLAT1 new flat at carter road			
\$5,400,000.00	\$482,000.00	\$4,918,000.00	16 Mar 2019
PACKAGINGMACHINE Box Packing Machine Arm			
\$100,000,000.00	\$71,850,000.00	\$28,150,000.00	01 Mar 2019
PRINTINGMACHINE XEROX machine			
\$1,000,000,000.00	\$712,990,000.00	\$287,010,000.00	01 Mar 2019
PRIVATELAND Private land at remote Location			
\$30,100,000.00	\$903,000.00	\$29,197,000.00	16 Mar 2019
ROADROLLER road roller machine			
\$28,000,000.00	\$11,384,000.00	\$16,616,000.00	16 Mar 2019
TCSSHARE share of tcs			
\$18,000.00	\$180.00	\$17,820.00	16 Mar 2019
TCSSHARE1 share of tcs			
\$18,000.00	\$180.00	\$17,820.00	16 Mar 2019

[Continue](#) [Save as Draft](#) [Cancel](#) [Back](#)


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23. Click **Continue** to go to the next step. The **Facility Application - Upload Documents** screen to upload the documents appears.

OR

Click and then click **Edit** to edit the newly added collateral. The **Add Collateral** overlay screen appears in the editable form.

OR

Click  and then click **Remove** to remove the newly added collateral.

OR

Click **Add Collaterals**, if you want to add more collaterals.

OR

Click **Save as Draft** to save the application as a draft. . The application gets saved as a draft prompting the user to save the application with the draft name. (For more information, refer [Save as Draft](#) section).

OR

Click **Cancel** to cancel the transaction and navigate to the **Dashboard** Screen.

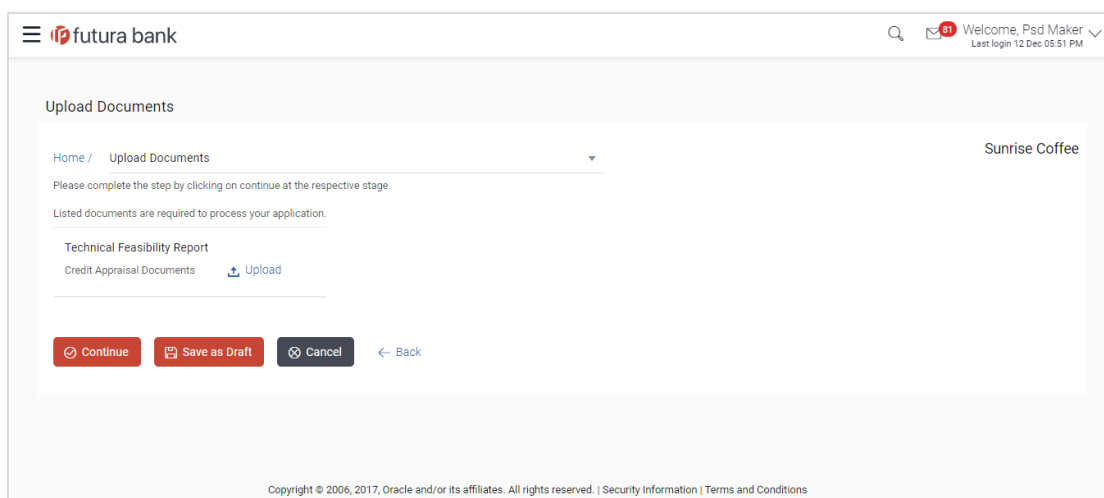
OR

Click **Back** to navigate back to the previous screen.

Facility Application - Upload Documents


Following screen is shown when user clicks on 'Upload Documents' step from the 'Facility Application Summary Page' or on accessing the step from breadcrumb available as a part of each step details screen or by clicking on continue on the collateral details page.

As a part of this step, corporate user can see the list of documents that needs to be submitted for applying a facility. User can upload the documents and proceed with the facility application. The list of documents displayed here are fetched from integrated mid-office/back office application.



Field Description

Field Name	Description
Party Name	Displays the party name for whom the facility is to be applied.
Document Name	The document that the corporate is expected to submit as a part of application. The list of the documents is fetched from the mid-office based on the selected product type.

24. Click  **Upload** against each document to browse and upload the required document to process the application.
 25. Select the appropriate file to be uploaded, and click **Open** to upload the documents.
 26. Click **Continue**. The **Facility Application** screen displaying all the three steps completed for facility application appears.
- OR

Click **Save as Draft** to save the application as a draft. The application gets saved as a draft prompting the user to save the application with the draft name. (For more information, refer [Save as Draft](#) section.)

OR

Click **Cancel** to cancel the transaction and navigate to the **Dashboard** Screen.

OR

Click **Back** to navigate back to the previous screen.

Facility Application

The screenshot displays the 'Amend Facility' screen in the Futura Bank application. At the top, there is a navigation bar with 'Viewer', 'ATM/Branch', and 'English' options. The user's name 'Welcome, Sonal Agarwal' and last login time 'Last login 23 Dec 10:47 AM' are visible. The main content area shows a progress indicator '0% Remaining' and a title 'GUARANTEE_1 of Sunrise Coffee'. Below this, three steps are listed, each with a 'Completed' status and a right-pointing arrow: 'Facility Requirements' (Let us know the amount and duration for credit facility), 'Collaterals' (View your existing collaterals and add new collaterals if required), and 'Upload Documents' (Submit supporting documents). At the bottom, there are three buttons: 'Submit' (red), 'Cancel' (dark grey), and 'Back' (blue).

27. Click **Submit**.

OR

Click the link against each card to view the **Facility Requirements/ Collaterals/ Upload Documents** section details.

OR

Click **Cancel** to cancel the operation and to navigate back to 'Dashboard'.

OR

Click **Back** to navigate back to the previous screen.

28. The **Facility Application - Review** screen appears.

Amend Facility - Review

ATM/Branch English

futura bank Welcome, Nick Fury Last login 20 Dec 01:45 PM

Collateral Evaluation

REVIEW
You have initiated a request for Facility Amendment. Please review the details before you confirm!

Facility Requirements

Funding Type	Revolving Line	Sanctioned Amount	Utilized Amount	Available Amount	Expiry Date	23.08 % Utilized
GUARANTEE	No	£433,270.00	£100,000.00	£333,270.00	17 Apr 2020	

Amended Details

Facility Amount	Tenure
\$1,433,270.00	3 years 1 months

Collaterals

Type	Currency	Estimated Value	Purpose
PRMT	USD	1000000	pledged for new business


Upload Documents

Technical Feasibility Report	Tech Doc.pdf
------------------------------	--------------

Terms and conditions
 I agree to the terms and conditions

[Confirm](#) [Cancel](#) [← Back](#)

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29. Click the **Terms and Conditions** link to view the terms and conditions.
30. Select the **I agree to the Term & Conditions** check box to accept the terms and conditions.
31. Verify the details, and click Confirm.
 OR
 Click  against the section that you want to edit. The screen appears in editable form.
 OR
 Click Show More to view the Facility Requirements/ Collaterals/ Upload Documents section details.
 OR
 Click Cancel to cancel the operation and to navigate back to 'Dashboard'.
 OR
 Click Back to navigate back to the previous screen.
32. The message for initiating the facility request appears along with the application reference number to track the status of your application.

[Home](#)

5. Apply For Sub Facility

Using this option, corporate users can apply for a new sub facility to an existing credit facility. The user selects the credit facility under which the new sub facility needs to be applied. Multiple Sub facilities can also be applied with this option.

Prerequisites:

- Party preference is maintained
- Corporate users are created
- Approval rule set up for corporate user to perform the actions

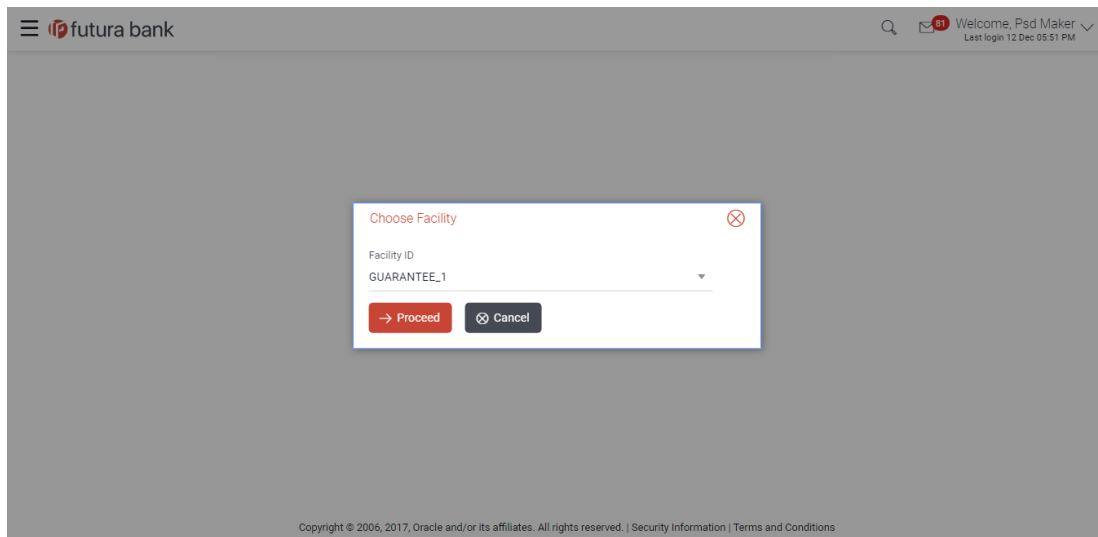
How to reach here:

Toggle Menu > Credit Facility Management > Credit Facility > Apply for Sub Facility

To apply for a new sub facility:

1. Click the **Apply for Sub Facility** option (from toggle menu or from Quick links). A pop up having option to select the Facility ID appears.

Sub Facility Application - Select Facility ID



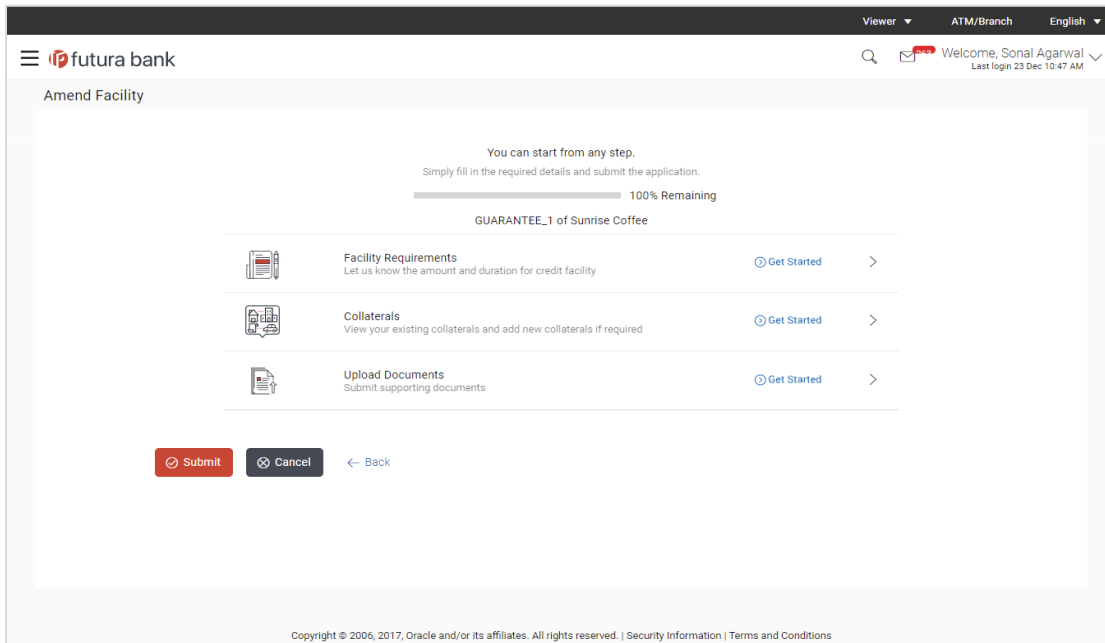
Field Description

Field Name	Description
Facility ID	List of all the Facility IDs mapped to the corporate.

2. From the **Facility ID** field, select the appropriate facility ID.
3. Click **Proceed**. The **Facility Application – Amendment** screen appears.
OR
Click **Cancel** to cancel the transaction and navigate to the **Dashboard** Screen.

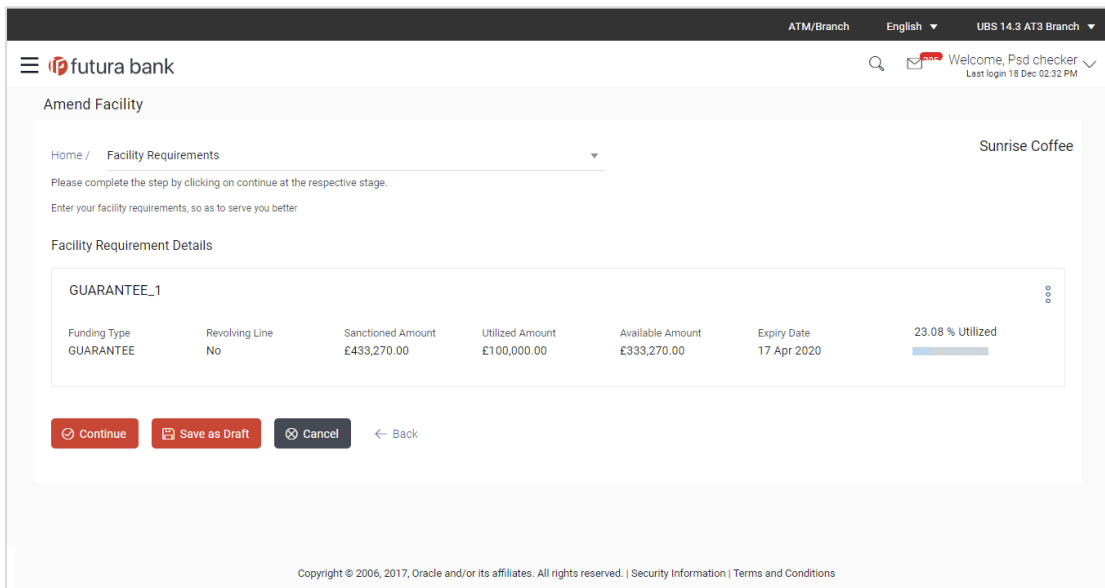
Facility Application – Summary Page


Credit Facility Amendment Application summary page displays the summary of all steps involved along with the completion status of each step.



4. Click the **Facility Requirements** card. The Facility Application screen appears.

Facility Application - Facility Requirement Details



5. Click  and then click **Add Sub Facility** to add the details for a sub facility under the selected facility. The **Add Sub Facility** overlay screen appears.

Add Sub Facility

Add Sub Facility [X]

Facility Amount
USD 2000

For how long do you need this facility?
2 6

In which category funds are required?
Term Loan

What is the purpose of this fund?
investment

Do you have any specific instructions for us?
emergency funds for business

[Add]

Sub Facility Application - Sub Facility Requirement Details

This screen will display the sub facility requirements entered by the user. Also, the user can add multiple sub facilities under the main credit facility from this screen.

ATM/Branch English UBS 14.3 AT3 Branch

Home / Facility Requirements

Please complete the step by clicking on continue at the respective stage.
Enter your facility requirements, so as to serve you better

Facility Requirement Details

Funding Type	Revolving Line	Sanctioned Amount	Utilized Amount	Available Amount	Expiry Date	23.08 % Utilized
GUARANTEE	No	£433,270.00	£100,000.00	£333,270.00	17 Apr 2020	

\$2,000.00 2 years 6 months
investment
emergency funds for business

[Continue] [Save as Draft] [Cancel] [Back]


Welcome, Psd checker
Last login 18 Dec 02:32 PM

Sunrise Coffee


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6. Click **Continue** to go to the next step. Collaterals details page with all the collaterals mapped to the party appears.


OR

Click  and then click **Add Sub Facility** to add more sub facility details, if required. The **Add Sub Facility** overlay screen appears.

OR

Click  and then click **Edit Facility** to edit the filled in facility requirements. The **Edit Facility Details** overlay screen appears.

OR

Click  and then click **Remove Facility** to remove the added facility.

OR

Click **Save as Draft** to save the application as a draft. The application is save as a draft prompting the user to save the application with the draft name. gets saved as a draft prompting the user to save the application with the draft name. (For more information, refer [Save as Draft](#) section).

OR

Click **Cancel** to cancel the transaction and navigate to the **Dashboard** Screen.

OR

Click **Back** to navigate back to the previous screen.

Note: 1) Once the application is saved as draft, the user will be able to resume the application from Application Tracker.

2) The user can add sub facilities up to seven levels.

[Home](#)

6. Collateral Evaluation

Collateral Evaluation is a process in which the customer approaches the bank and requests the bank to evaluate his collateral. Bank assess the collateral and informs the customer about the value of the collateral that the Bank can offer, if the customer agrees to the value proposed by the bank and to the other Terms and Conditions, then the collateral gets pledged with the Bank.

Using this option, corporate customers can request for evaluation of a collateral by providing the required details like collateral type, its description, market value, its ownership information and the details of banks where the collateral is already pledged. Corporate user can also upload the required supporting documents using the OBDX platform.

Collateral evaluation process goes through various stages starting from providing the details of collateral that is to be evaluated, until the review and acceptance of collateral evaluation application.

Corporate user can track the status of the collateral evaluation applications using Application Tracker available within OBDX.

Prerequisites:

- Party preference is maintained
- Corporate users are created
- Approval rule set up for corporate user to perform the actions

How to reach here:

Toggle Menu > Credit Facility Management > Collaterals > Collateral Evaluation

To request for Collateral evaluation:

1. Navigate to the **Collateral Evaluation** screen. The **Collateral Evaluation – Summary** page appears.

Collateral Evaluation – Summary Page

Collateral Evaluation summary page displays the summary of all steps involved in evaluation with the completion status of each step.

Following are the steps involved in the evaluation of a collateral:

- **Collateral Details:** In this section, user needs to provide the details of all the collateral, which needs to be evaluated. User needs to provide information like collateral type, estimated value of the collateral, description, purpose, insurance details if any etc.
- **Ownership Details:** In this section, user needs to provide the ownership details of the collateral for which the collateral evaluation request is being submitted. Ownership details like Name of the owner(s) with their Party ID and ownership percentage can be provided in this section.
- **Seniority Details:** In this section, user needs to enter the details of bank with which the collateral is already pledged.
- **Upload Documents:** This section lists all the documents, which are required to be submitted as part of collateral evaluation application and user will be required to upload all the mandatory documents.

The home screen also displays the collateral evaluation application completion status with a progress bar. User can start filling up the application in any sequence i.e. user can click on any

step and fill in the details. Application can be submitted for processing, only after filling the mandatory information required as a part of each step.

The screenshot displays the 'Collateral Evaluation' interface for 'Sunrise Coffee'. It features a progress bar indicating '100% Remaining'. Below the progress bar, there are four main steps, each with an icon, a title, a description, and a 'Get Started' button:

- Collateral Details:** Provide the details of the collateral which needs to be evaluated.
- Ownership Details:** Confirm if the collateral has single or joint ownership.
- Seniority Details:** Provide the charge details for the collateral.
- Upload Documents:** Submit supporting documents.

At the bottom of the interface, there are three buttons: 'Submit' (red), 'Cancel' (grey), and 'Back' (grey).

Field Description

Field Name	Description
Party Name	Displays the primary party name of the user for which the collateral needs to be evaluated.
Progress Bar	Completion status of the Collateral Evaluation application is displayed graphically with the help of a progress bar.
Collateral Details	User can click on this step to add the details of the collateral, which is required to be evaluated.
Ownership Details	User can click on this step to fill in the ownership details of the Collateral.
Seniority Details	User can click on this step to add the Bank's details with which the collateral is already pledged.
Upload Documents	The user can click on this link for uploading the required documents.

2. Click the **Collateral Details** card. The **Collateral Details** screen appears.

Collateral Details

ATM/Branch English

futura bank Welcome, Sonal Agarwal
Last login 19 Dec 11:03 AM

Collateral Evaluation

Home / Collateral Details

Please complete the step by clicking on continue at the respective stage.

Provide the details of the collateral which needs to be evaluated

What is the type of collateral? Machine

Please provide a brief description of the collateral
Printing Machine

What is the estimated value of this collateral?
USD \$1,000,000.00

In what currency the collateral should be evaluated?
USD

Is insurance available for the collateral?
 Yes No

What is the insurance expiry date?
31 Dec 2020

From what date the collateral is available?
01 Jan 2020

Do you have any specific instructions for us?
Printing machine of Xerox brand ,January 2018 Make

Continue Save as Draft Cancel Back

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Field Description

Field Name	Description
Navigating path to the step	Select the step from the drop- down list to navigate to the step for which details are to be filled for the collateral evaluation application. OR Click the Home link to navigate back to collateral evaluation summary page.
Party Name	Displays the primary party name of the user for which the collateral needs to be evaluated.
What is the type of Collateral?	Select the collateral type like Plant & Machinery, Vehicle, Stocks etc.
Please provide a brief description of the collateral	The description of the collateral, which is to be evaluated.
What is the estimated value of this collateral?	Select the currency and enter the estimated value of the collateral.

Field Name	Description
In what currency the collateral should be evaluated?	Select the currency in which collateral needs to be evaluated.
Is insurance available for the collateral?	Specify if collateral is secured with insurance or not.
What is the insurance expiry date?	The date of expiry of the insurance, if collateral is secured with insurance. This field appears if you select Yes option against Is insurance available for the collateral?
From what date the collateral is available?	The date from which Collateral will be available to the bank.
Do you have any specific instructions for us?	The remarks/ instructions that needs to be communicated to the bank.

3. From the **What is the type of collateral?** list, select the appropriate collateral type.
4. In the **Please provide a brief description of the collateral** field, enter the description of the collateral.
5. From the **What is the estimated value of this collateral?** list, select the appropriate currency and enter the estimated collateral value.
6. From the **In what currency the collateral should be evaluated?** list, select the appropriate currency in which collateral needs to be evaluated.
7. In the **Is insurance available for the collateral?** field, select whether the insurance is available or not for the collateral.
 - a. If you select **Yes** option, select the insurance expiration date from the **What is the insurance expiry date?** field.
8. In the **From what date the collateral is available?** field, select the date from which Collateral will be available to the bank.
9. In the **Do you have any specific instructions for us?** field, enter the remarks/ instructions that needs to be communicated to the bank, if any.
10. Click **Continue** to go to the next step. The **Ownership Details** screen appears.
 - OR
 - Click **Save as Draft** to save the application as a draft. The application gets saved as a draft prompting the user to save the application with the draft name. (For more information, refer [Save as Draft](#) section).
 - OR
 - Click **Cancel** to cancel the transaction and navigate to the **Dashboard** Screen.
 - OR
 - Click **Back** to navigate back to the previous screen.

Ownership Details

ATM/Branch English

futura bank Welcome, Sonal Agarwal
Last login 19 Dec 11:03 AM

Collateral Evaluation

Home / Ownership Details Sunrise Coffee

Please complete the step by clicking on continue at the respective stage.
Confirm if the collateral has single or joint ownership.

Name of the Owner Mr. Joe Thomas	Party ID of the owner with Futura Bank 004308
Ownership Percentage (%) 100	Primary Owner <input checked="" type="checkbox"/>

Add Owner

[Continue](#) [Save as Draft](#) [Cancel](#) [← Back](#)

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Field Description

Field Name	Description
Navigating path to the step	Select the step from the drop- down list to navigate to the step in which details have to be filled for the collateral evaluation application. OR Click the Home link to navigate back to collateral evaluation summary page.
Party Name	Displays the party name of the user for which the collateral needs to be evaluated.
Name of the Owner	The name of the collateral owner.
Party ID of the owner with Futura Bank	The party id for collateral owner associated with the Bank.
Ownership Percentage (%)	Enter ownership percentage associated with collateral. If a single ownership then ownership percentage should be 100 % and if an ownership is joint with multiple owners then addition of percentage shared between all owners should be equal to 100 %.
Primary Owner	Enable the toggle switch against the details of Primary owner. This will define if the owner is the primary owner of the collateral.
Add Owner	The link to add additional co-owner(s) details with whom collateral ownership is shared.

11. In the **Name of the Owner** field, enter the name of the collateral owner.

12. In the **Party ID of the owner with Futura Bank** field, enter the party id for collateral owner.
13. In the **Ownership Percentage (%)** field, enter the percentage of ownership associated with collateral.
14. Click the **Primary Owner** toggle button, if the details entered are of the primary owner.
15. Click **Continue** to go to the next step. The **Seniority Details** screen appears.
 - OR
 - Click the **Add Owner** link to add the details of co-owners, if the collateral is shared by more than one owner.
 - OR
 - Click the **Remove Owner** link if you want to remove the added owner details.
 - OR
 - Click **Save as Draft** to save the application as a draft. The application gets saved as a draft prompting the user to save the application with the draft name. (For more information, refer [Save as Draft](#) section).
 - OR
 - Click **Cancel** to cancel the transaction and navigate to the **Dashboard** Screen.
 - OR
 - Click **Back** to navigate back to the previous screen.

Seniority Details

futura bank

Welcome, Sonal Agarwal
Last login 19 Dec 11:03 AM

Collateral Evaluation
Sunrise Coffee

Home / Seniority Details
▼

Please complete the step by clicking on continue at the respective stage.

Provide the charge details for the collateral.

Is this collateral already charged?

Yes
 No

With how many Banks this collateral is already charged?

One
 Two

Details of Primary Bank/Entity where collateral is pledged ^

Bank/Entity Name	Percentage Pledged
JP Morgan	45
Point of Contact	Branch Name
Mr. Nick D' mello	London
Branch Address Line 1	Branch Address Line 2
123, Link Avenue	Nr.Metro Station
City	State
London	London
Country	Zip Code
United Kingdom	123456
Branch Email Address	Branch Contact Number
nice@jp.com	12345679

Details of Secondary Bank/Entity where collateral is pledged ^

Bank/Entity Name	Percentage Pledged
RBS	30
Point of Contact	Branch Name
Mr. Roger John	London
Branch Address Line 1	Branch Address Line 2
London	London
City	State
London	London
Country	Zip Code
United Kingdom	123457
Branch Email Address	Branch Contact Number
roger@rbs.com	123456789

Continue
 Save as Draft
 Cancel
← Back

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Field Description

Field Name	Description
Navigating path to the step	Select the step from the drop- down list to navigate to the step in which details are to be filled for the collateral evaluation application. OR Click the Home link to navigate back to collateral evaluation summary page.
Party Name	Displays the primary party name of the user for which the collateral needs to be evaluated.
Is this collateral already charged?	Specify if there is any existing charge on the collateral. The options are: <ul style="list-style-type: none"> • Yes • No
With how many Banks this collateral is already charged?	The number of banks/ financial institute with which collateral is already charged (pledged). The options are: <ul style="list-style-type: none"> • One • Two
Details of Primary Bank/ Entity where collateral is pledged	
Below fields capture the details of First Charge Holder	
Bank/ Entity Name	The name of the bank / financial institute, where the collateral is already pledged.
Percentage Pledged	The percentage of charge on the collateral by Primary Bank / financial institute. The charged percentage must be always less than 100%.
Point of Contact	Name for the point of contact of the bank / financial institute where the collateral is pledged.
Branch Name	The branch name of bank/financial institute.
Branch Address Line 1 -2	The branch address where bank /financial institute is located.
City	The city in which bank /financial institute is located.
State	The state name where bank /financial institute is located.
Country	The country in which bank /financial institute is located.
Zip Code	The zip code of the area where bank /financial institute is located.

Field Name	Description
Branch Email Address	The email address of the bank branch.
Branch Contact Number	The contact number of the bank branch.
Details of Secondary Bank/ Entity where Collateral is pledged	
This section appears if you select Two in the field, “ With how many Banks this collateral is already charged? ”	
Note: Fields that appear in this section are same as described in Details of Primary Bank/ Entity where collateral is pledged section.	

16. In the **Is this collateral already charged** field, select the appropriate option whether collateral is already charged or not.
17. In the **With how many Banks this collateral is already charged** field, select the appropriate option.
18. In the **Bank/ Entity Name** field, enter the name of the bank / financial institute, which holds an existing charge on the collateral.
19. In the **Percentage Pledged** field, enter the percentage of charge held by the bank / financial institute.
20. In the **Point of Contact** field, enter the name of the contact person of the bank.
21. In the **Branch Name** field, enter the name of bank branch.
22. In the **Branch Address Line 1 and 2** field, enter the address of the bank.
23. In the **City** field, enter the city to of the bank branch.
24. In the **State** field, enter the state of the bank branch.
25. From the **Country** list, select the country of the bank branch.
26. In the **Zip Code** field, enter the zip code of the bank branch.
27. In the **Branch Email Address** field, enter the email address of the bank branch.
28. In the **Branch Contact Number** field, enter the contact number of the bank branch.
29. In the **Details of Secondary Bank/ Entity where Collateral is pledged** section, enter the relevant details, if you have selected option **Two** in the field “**With how many Banks this collateral is already charged?**”
30. Click **Continue** to go to the next step. The **Upload Documents** screen appears.
OR
Click **Save as Draft** to save the application as a draft. The application gets saved as a draft prompting the user to save the application with the draft name. (For more information, refer Save as Draft section).
OR
Click **Cancel** to cancel the transaction and navigate to the **Dashboard** Screen.
OR
Click **Back** to navigate back to the previous screen.

Note: Once the application is saved as draft, the user will be able to resume the application from Application Tracker.

Upload Documents

Following screen is shown when user clicks on 'Upload Documents' step from the 'Collateral Evaluation Summary Page' or on accessing the step from breadcrumb option available as a part of each step details screen. As a part of this step, corporate user can see the list of documents that needs to be submitted for applying for a Collateral Evaluation. User can upload the documents and proceed with the application. The list of documents displayed here are fetched from integrated mid-office/back office application.


The screenshot displays the 'Collateral Evaluation' interface for 'Sunrise Coffee'. It includes a navigation bar with 'futura bank' and user information. The main content area shows the 'Upload Documents' step with instructions to complete the step by clicking 'Continue'. A table lists required documents: 'Application Form' (Other Doc.pdf) and 'Collateral Documents' (Tech Doc.pdf). At the bottom, there are buttons for 'Continue', 'Save as Draft', 'Cancel', and 'Back'.

This screen lists down all documents required to initiate the evaluation process of the collateral. The list of documents listed here are fetched from mid-office/back-office application.

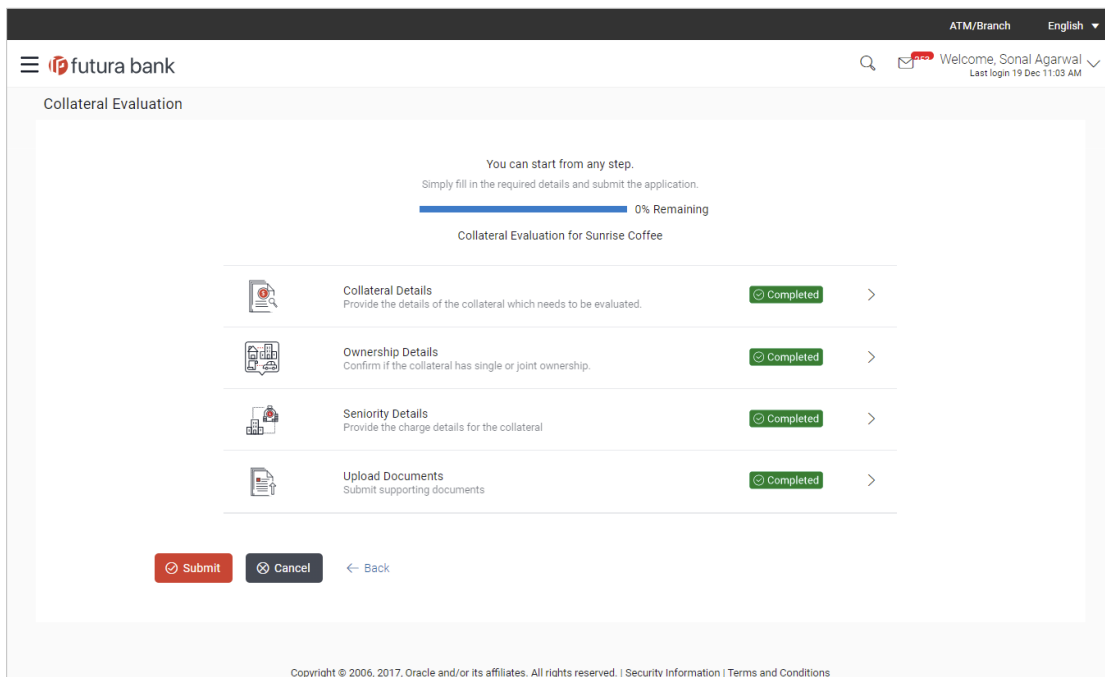
Field Description

Field Name	Description
Navigating path to the step	Select the step from the drop- down list to navigate to the step in which details are to be filled for the collateral evaluation application. OR Click the Home link to navigate back to collateral evaluation summary page.
Party Name	Displays the party name of the user for which the collateral needs to be evaluated.

Field Name	Description
Document Name	List of documents that the corporate is expected to submit as part of Collateral Evaluation application along with the option to upload the document. The list of the documents are fetched from the mid-office based on the selected application type.

31. Click  to browse and upload the required document to process the application.
32. Select the appropriate file to be uploaded, and click Open to upload the documents.
33. Click **Continue**. The **Collateral Evaluation** Home screen with the completion of all the steps appears.
OR
Click **Save as Draft** to save the application as a draft. The application gets saved as a draft prompting the user to save the application with the draft name. (For more information, refer **Save as Draft** section.)
OR
Click **Cancel** to cancel the transaction and navigate to the **Dashboard** Screen.
OR
Click **Back** to navigate back to the previous screen.

Collateral Evaluation



The screenshot displays the 'Collateral Evaluation' progress screen for 'Sunrise Coffee'. At the top, it indicates 'You can start from any step. Simply fill in the required details and submit the application.' A progress bar shows '0% Remaining'. Below this, four steps are listed, each with a 'Completed' status and a right-pointing arrow:

- Collateral Details**: Provide the details of the collateral which needs to be evaluated.
- Ownership Details**: Confirm if the collateral has single or joint ownership.
- Seniority Details**: Provide the charge details for the collateral.
- Upload Documents**: Submit supporting documents.

At the bottom, there are three buttons: a red 'Submit' button, a grey 'Cancel' button, and a blue 'Back' button with a left-pointing arrow.

34. Click **Submit**.
OR
Click the link against each card to view the **Collateral Details/ Ownership Details/ Seniority Details/ Upload Documents** section details.
OR
Click **Cancel** to cancel the operation and to navigate back to 'Dashboard'.

OR

Click **Back** to navigate back to the previous screen.

35. The **Collateral Evaluation - Review** screen appears.

Collateral Evaluation – Review

The screenshot shows the 'Collateral Evaluation - Review' screen in the Futura Bank interface. The page header includes the bank logo, search, and user information (Welcome, Sonal Agarwal, Last login 19 Dec 11:03 AM). The main content area is titled 'Collateral Evaluation' and features a 'REVIEW' notification: 'You initiated a request for Collateral Evaluation. Please review details before you confirm!'. Below this are four main sections, each with a 'Show More' button and an edit icon:

- Collateral Details:** Type: MCHN, Description: Printing Machine, Estimated Value: \$100,000.00, Evaluated Currency: USD.
- Ownership Details:** Name of the Owner: Mr. Joe Thomas, Party ID of the owner: 004308, Ownership Percentage (%): 91.00, Primary Owner: Yes.
- Seniority Details:** Collateral Charged: true, Seniority Level: one.
- Upload Documents:** Application Form, Other Doc.pdf, Collateral Documents, Tech Doc.pdf.

At the bottom, there is a 'Terms and conditions' section with a checked checkbox 'I agree to the terms and conditions'. Below this are three buttons: 'Confirm' (red), 'Cancel' (grey), and 'Back' (blue).


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36. Click the **Terms and Conditions** link to view the terms and conditions.

37. Select I agree to the **Term & Conditions** check box to accept the terms and conditions.

38. Verify the details, and click **Confirm**.

OR

Click  against the section that you want to edit. The screen appears in editable form.

OR

Click **Show More** to view the **Collateral Details/ Ownership Details/ Seniority Details/ Upload Documents** section details.

OR

Click **Cancel** to cancel the operation and to navigate back to 'Dashboard'.

OR

Click **Back** to navigate back to the previous screen.

39. On successful submission, confirmation message for initiating the collateral evaluation appears along with the Application ID to track the status of your application and status of the application.

Click the **Go To Dashboard** link to go to the **Dashboard** screen.

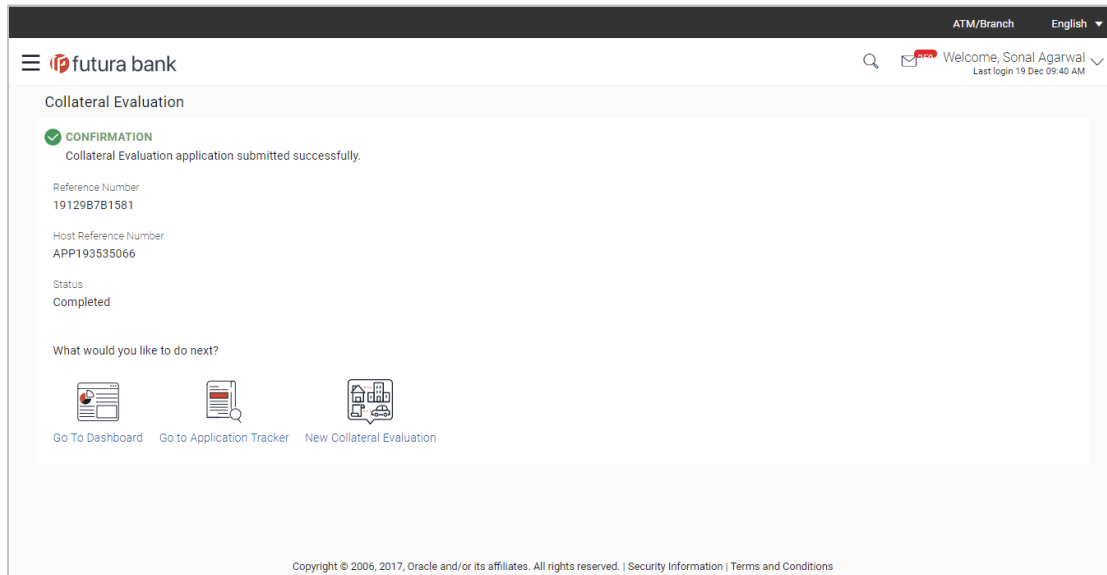
OR

Click the **Go To Application Tracker** link to go to the **Application Tracker** screen.

OR

Click the **New Collateral Evaluation** link to initiate new collateral Evaluation application.

Collateral Evaluation – Confirm



[Home](#)

7. Collateral Revaluation

Using Collateral revaluation function, corporate user can request for revaluation of an existing collateral. Generally a corporate would request for revaluation of a collateral if the market value of the pledged collateral has changed.

Corporate user needs to provide the reason for getting the collateral revaluated and the same gets submitted to mid office/back office user. Corporate user can also upload documents as part of collateral re-valuation application.

User can track the status of the collateral re-valuation application using Application Tracker available within OBDX.

Prerequisites:

- Party preference is maintained
- Corporate users are created
- Approval rule set up for corporate user to perform the actions

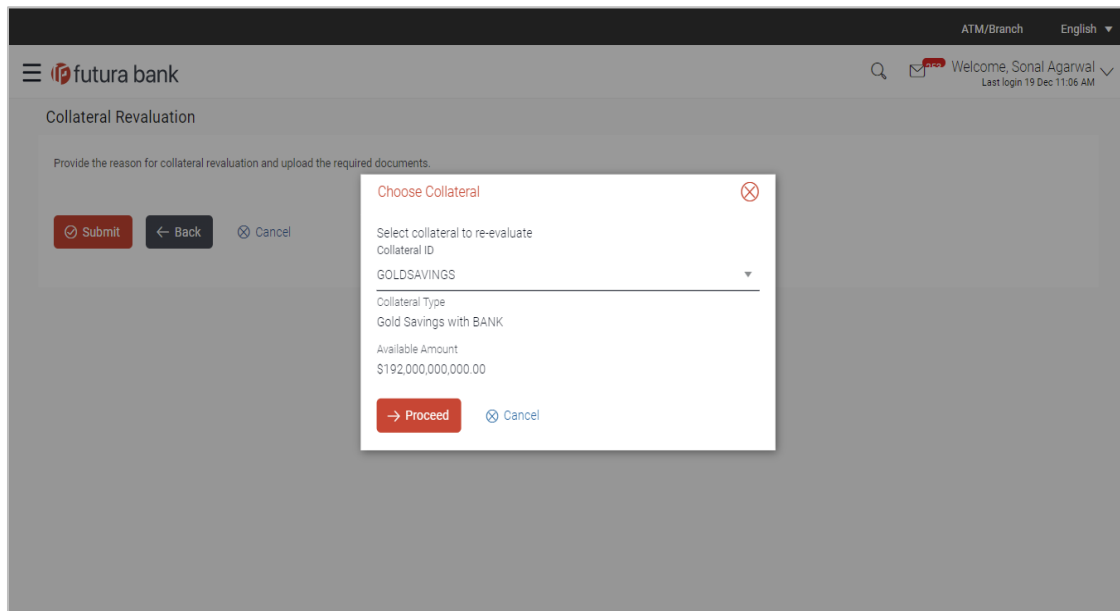
How to reach here:

Toggle Menu > Credit Facility Management > Collaterals > Collateral Revaluation

To request for re-evaluation of a collateral:

1. Navigate to the **Collateral Revaluation** option. **Choose Collateral** pop-up appears.

Choose Collateral



Field Description

Field Name	Description
Select collateral to re-evaluate Collateral ID	Select the collateral ID of the collateral that needs to be revaluated from the list of available collateral IDs.
Collateral Type	Displays the collateral type under which the selected collaterals is defined.
Available amount	Displays the current available amount for the selected collateral.

- From **Collateral ID** list, select the collateral for revaluation.
- Click **Proceed**. The **Collateral Revaluation Application** screen appears.
OR
Click **Cancel** to cancel the transaction and navigate to the **Dashboard** Screen.

Collateral Revaluation Details

ATM/Branch English

futura bank Welcome, Sonal Agarwal
Last login 18 Dec 02:48 PM

Collateral Revaluation

Provide the reason for collateral revaluation and upload the required documents.

Collateral Details [Change Collateral](#)

GOLDSAVINGS	Gold Savings with BANK
Collateral Amount \$200,000,000,000.00	Utilized Amount \$0.00
Available Amount \$192,000,000,000.00	Revision Date 16 Mar 2020

What is the reason for revaluation?
International Market value is changed for Gold

Do you have any specific instructions for us?
Gold Savings available with Bank

Upload Documents

Listed documents are required to process your application.

Application Form
Collateral Documents Other Doc.pdf

Collateral Documents
Collateral Documents Tech Doc.pdf


[Submit](#) [Back](#) [Cancel](#)

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Field Description

Field Name	Description
Collateral Details	
Collateral ID	The unique collateral ID and description of the collateral.

Field Name	Description
Collateral Amount	The total collateral amount of the selected collateral.
Utilized Amount	The total utilized amount of the collateral.
Available Amount	The current available amount for collateral.
Revision Date	The next revaluation date of the collateral.
What is the reason for revaluation?	Enter the reason for getting the collateral revaluated.
Do you have any specific instructions for us?	Enter any remarks/instructions, which needs to be communicated to the bank.
Upload Documents	This field lists down all the documents, which are required to be submitted as part of Collateral revaluation application. The user can upload the required documents against the list of documents getting displayed.

4. Click **Change Collateral**, if you want to change the selected collateral for revaluation.
5. In the '**What is the reason for revaluation?**' field, enter the reason of revaluation of the collateral.
6. In the '**Do you have any specific instructions for us?**' field, enter remarks/instructions of a collateral, if any.
7. Click  **Upload** to browse and upload the required documents to process the application.
8. Select the appropriate file to be uploaded, and click **Open** to upload the documents.
9. Click **Submit**.
OR
Click **Cancel** to cancel the operation and to navigate back to 'Dashboard'.
OR
Click **Back** to navigate back to the previous screen.
10. The **Collateral Revaluation - Review** screen appears.

Collateral Revaluation – Review

ATM/Branch English

futura bank Welcome, Sonal Agarwal
Last login 18 Dec 02:48 PM

Collateral Revaluation

Review
You initiated a request for Collateral Revaluation. Please review details before you confirm!

Collateral Details

GOLDSAVINGS - Gold Savings with BANK			
Collateral Amount \$200,000,000,000.00	Utilized Amount \$0.00	Available Amount \$192,000,000,000.00	Revision Date 16 Mar 2020

What is the reason for revaluation?
International Market value is changed for Gold

Do you have any specific instructions for us?
Gold Savings available with Bank

Upload Documents

Application FormOther Doc.pdf

Collateral DocumentsTech Doc.pdf

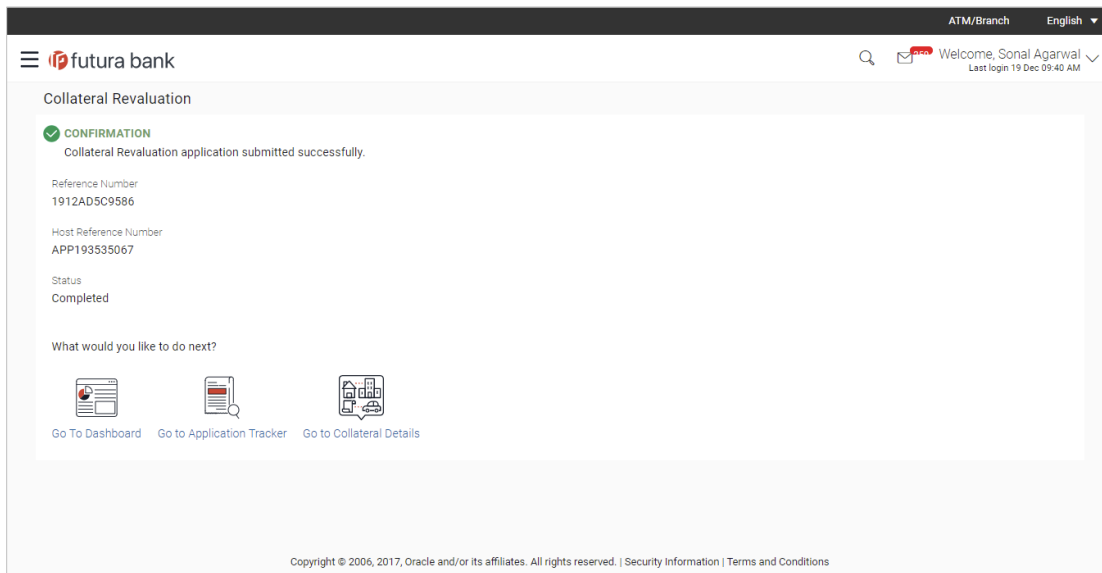
Terms and conditions
 I agree to the Terms and conditions

Confirm **Back** **Cancel**

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11. Click the **Terms and Conditions** link to view the terms and conditions.
12. Select **I agree to the Term & Conditions** check box to accept the terms and conditions.
13. Verify the details, and click **Confirm**.
OR
Click **Cancel** to cancel the operation and to navigate back to 'Dashboard'.
OR
Click **Back** to navigate back to the previous screen.
14. On successful submission, confirmation message for initiating the collateral revaluation appears along with the Application ID to track the status of your application and status of the application gets displayed.
Click the **Go To Dashboard** link to go to the **Dashboard** screen.
OR
Click the **Go To Application Tracker** link to go to the **Application Tracker** screen.
OR
Click the **New Collateral Evaluation** link to initiate new collateral Evaluation application.

Collateral Revaluation - Confirm



The screenshot shows a web interface for Futura Bank. At the top right, there are links for 'ATM/Branch' and 'English'. The Futura Bank logo is on the left. A search icon and a notification icon are next to the user's name 'Welcome, Sonal Agarwal' and the last login time 'Last login 19 Dec 09:40 AM'. The main content area is titled 'Collateral Revaluation' and features a green checkmark icon followed by the text 'CONFIRMATION' and 'Collateral Revaluation application submitted successfully.' Below this, the following details are listed: Reference Number: 1912AD5C9586, Host Reference Number: APP193535067, and Status: Completed. A section titled 'What would you like to do next?' contains three icons with corresponding links: 'Go To Dashboard', 'Go to Application Tracker', and 'Go to Collateral Details'. At the bottom of the page, there is a copyright notice: 'Copyright © 2006, 2017, Oracle and/or its affiliates. All rights reserved. | Security Information | Terms and Conditions'.

[Home](#)

8. Application Tracker- Credit Facility

The Application Tracker enables the corporate to view the current status of submitted applications and also to retrieve and resume applications that have been saved as draft. User can search for the required application using various search criteria.

Through the application tracker, Corporate can perform the following actions:

- **Resume Draft Applications:** While filling out an application form, user has the option to save the application as draft, and the saved application can be viewed and resumed via application tracker.
- **Submitted Application Details:** The application tracker enables the corporate user to track the current status of the application and to view the details of submitted applications which were entered by the user at the time of application submission.

How to reach here:

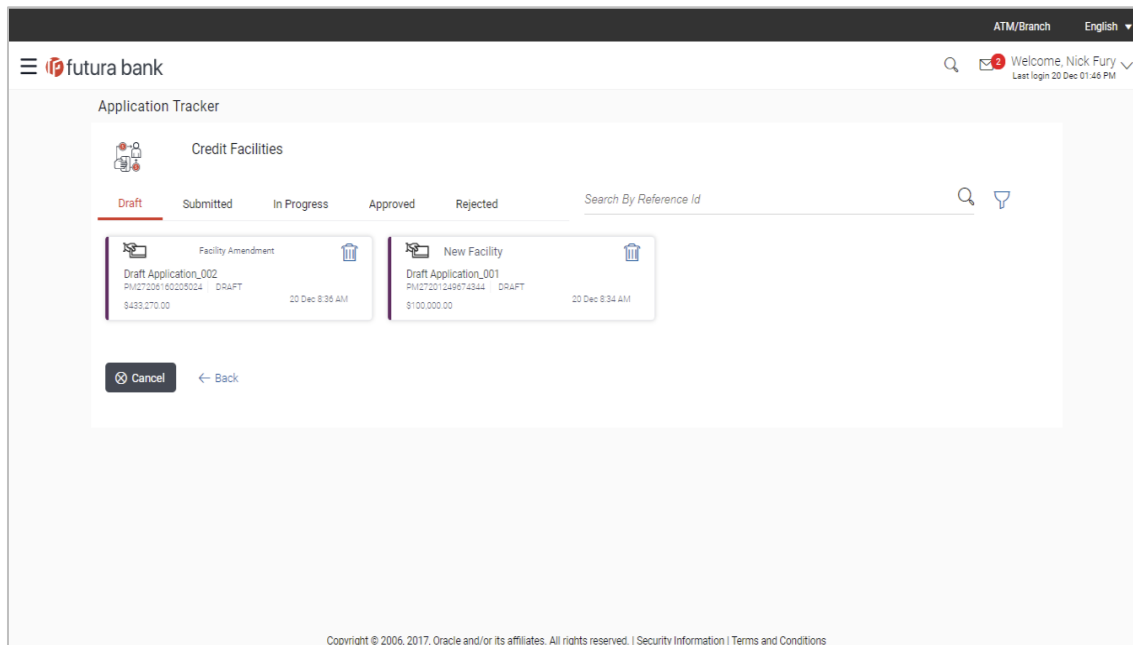
Dashboard > Toggle menu > Application Tracker > Credit Facility

To track an application:

1. Click on the **Credit Facility** option in **Select Module** section.
The **Application Tracker- Credit Facilities** screen appears.

Application Tracker - Credit Facilities



This screen lists down all the Credit Facility applications that are submitted or saved by the corporate user. All the submitted applications gets listed under different tabs (Submitted, In-progress, Approved, Rejected) depending upon their current status at mid office/back office application. Applications which are saved by user are available under Draft tab from where the user can select an application and can resume it.



Field Description

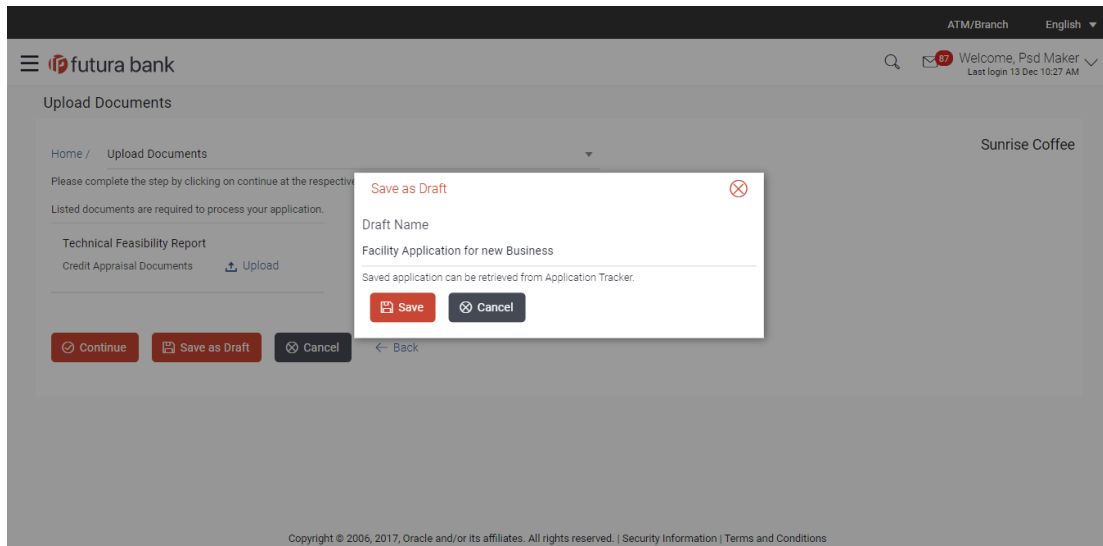
Field Name	Description
Search	Enter any key word to search the application in the selected tab.
Filter	
Request Type	To filter the applications based on request type. The options are: <ul style="list-style-type: none"> • All • New Facility • Facility Amendment • Collateral Evaluation • Collateral Revaluation
Duration	Option to filter the applications based on the time of submission. The options are: <ul style="list-style-type: none"> • Last 7 Days • Last 15 Days • Last 1 Month • Last 3 Months • Last 6 Months • Last 1 Year
Search Result	
	Applications summary in card form gets displayed basis on the search criteria entered.
Application Summary	
Facility Request Type	The type of request like 'New Facility' 'Facility Amendment', 'Collateral evaluation' etc.
Request Name	The name of the facility/collateral type for which the facility application is saved as draft.
Application Reference Number	The application reference number as generated by the bank at the time the application was saved as draft.

Field Name	Description
Status	<p>The current application's progress.</p> <p>The status can be:</p> <ul style="list-style-type: none"> • Draft – applications which has not yet submitted and is just saved by the applicant • Submitted – application has been filled and submitted for further processing but action has not been taken by the Bank yet • In progress – application is getting processed in the mid office and is yet to be approved or rejected • Approved – the application which are approved by back office/ middle office • Rejected – the application which are rejected by back office/ middle office
Amount	The facility/collateral amount in the application.
Submitted On	The date and time on which the application was submitted.
Last Saved On	The date and time on which the application was saved as draft. This is applicable for applications available under Draft tab.

2. Search or filter an application;
 In the **Search By Transaction ID** field, enter the application reference number by which application is to be searched, and click .
 OR
 Click  of the filter by list, the popup showing filter options opens.
 - b. From the **Request Type** list, select the appropriate facility request type.
 OR
 From the **Duration** list, select the duration for which the applications needs to be tracked.
 - c. Click **Reset** to clear the criteria selected.
3. The widgets of facility application appears based on search criteria.
 If you click the facility application card with the status as **Draft**, it opens the facility application details screen with pre-populated details that you have already entered and saved, you can update those details in the application form and submit the application.
 OR
 If you click on the application card with the status as **Submitted**, it opens the facility application details screen as 'submitted' by the customer.
 OR
 Click **Cancel** to cancel the transaction.
 OR
 Click **Back** to navigate back to previous screen.

8.1 Save as Draft

User can save facility application as a Draft if he is unable to fill the complete application in one go. The draft application can be resumed anytime later by the user. Once the application is saved, it will appear in the application tracker under 'Drafts' tab. User can select the draft application he wants to resume and fill in all the required details and submit that application.



Field Description

Field Name	Description
Draft Name	Enter the name of the draft to save the application with a draft name.

1. In the **Draft Name** field, enter the name of the draft.
2. Click **Save**. The success message appears and application gets saved as a draft and appears as card in the **Application Tracker – Summary** screen.
OR
Click **Cancel** to cancel the operation and to navigate back to 'Dashboard'.
3. Click the **Go to Application Tracker** link to track your application.
OR
Click the **New Facility Application** link to apply for a new facility.
OR
Click the **Go To Dashboard** link to navigate to back to the Dashboard.

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