

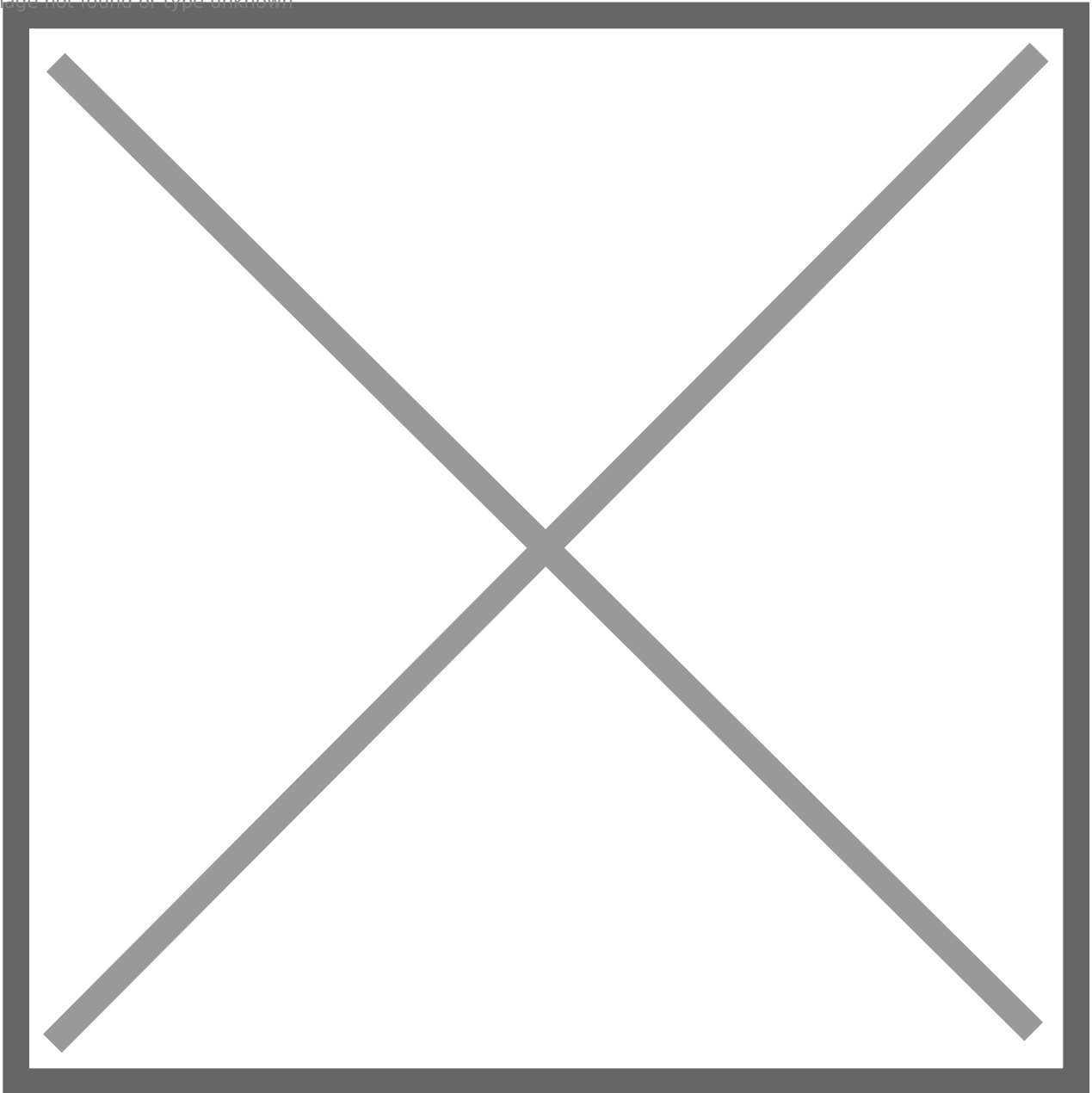
# Dashboard Overview

Once you login, you will land on Dashbaord. Dashboard provdies below capabilities

1. Review list of applications
2. [Search and Filter Applications](#)
3. Switch between Lending and Deposit using the toggle at the right top (if you have permissions to view both Lending and Deposit)
4. Create a new Application (see attached image)
5. Create a new prospect applicaiton (see attached image)
6. Enter into an edit/view mode of the application (see attached image)
7. Shortcuts to Notes, Reminders and assignment functionality

High-level Deposit dashboard level features

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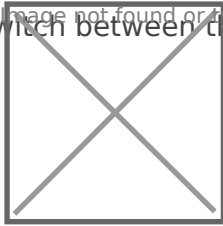


How to Toggle Between Account Opening  
and Lending Dashboard?

The first time you login you will be directed to the dashboard. Here depending on the product and permissions you may see slightly different screens.

1. Deposit
2. Lending

You can switch between the two products if applicable using the toggle on the top right of the



window. -

## Lending Dashboard

How to filter through the applications in your dashboard queue?

1. Filter By Queue

My Applications ,Incomplete ,No Offer,No Offer No Hit,Final Submit,Offer Expired,Final Submit Failed,Offer Generated,Prospect,Final Submit (Referred),No Hit,Coborrower No Hit,No Offer Soft Decline,No Offer (Referred),Withdrawn

1. My Applications - Refers to applications create by you in the back-office or assigned to you
2. Incomplete Applications - Applications abandoned by the user before receiving offers
3. Offer Generated - Applications that have received and seen offers but haven not made selection
4. Final Submit

5. Final Submit(Referred) - Any application with status (Referred) is not an auto approved app, and will require a decision on CreditSnap (if CS LOS) or on your LOS (if external LOS).
  6. No Offer - Applicant does not meet your eligibility criteria to receive offers or is flagged by fraud checks
  7. No Offer No Hit - There is no bureau report on this user to present offers
  8. No-offer(Soft Decline) - Applicant is declined but if applicable to your institution - your Underwriters can manually generate and present offers to this applicant in special cases
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2. Filter By Product - Allows you to filter by Products that are relevant to your institution that are available on CreditSnap
  3. Filter By Search - You can filter using inputs such as - First Name ,Last Name, Contact No, Email, Underwriting Application , Referral , App ID and, entering

## Account Opening Dashboard

The deposit dashboard gives you a snapshot of all the applications in your queue along with a number of high level features as well.

### What is the order of Steps for a complete Account opening application?

Before diving into the Deposit Dashboard here is the applicable order of steps that need to be completed to complete an Account Opening Application

1. Complete Application and Provide Consents
2. Complete KYC/ID-Verification to Successfully generate Member related credentials from Core
3. E-signatures for Account Opening Docs
4. Funding the account

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Revision #7

Created 1 June 2024 20:03:19 by Admin

Updated 2 June 2024 23:06:51 by Admin