

LOANS PROCESSING

Loans | Customers | Dashboard | CaseBook | Processors | Admin

scott Nov 19, 2009 20:13

Customer ID

Loan Number

Loan Type

Loan Status

Current Activity

Assigned To

From

To

Search

Clear

-- Select --
▼

-- Select --
 Equipmer
 Equity
 Mortgage
 New Type

-- Select -
▼

-- Select --
▼

-- Select
▼

Customer ID	Customer	Loan	Type	Status	Activity	Assigned To	Loan Date	Created
15011388	Tesla Manufacturing	36335451	Term	New	Intake	kapoor	2009-10-20	2009-10-02 16:31
15568117	Super Transprtator	74512345	Term	New	Intake	bratton	2009-10-07	2009-10-02 15:09
54502650	Sunset Resrts	43612345	Term	New	Intake	bratton	2009-09-16	2009-09-29 11:33
39357296	Unreal Realtors	78316761	Term	Open	Hold	bratton	2009-09-24	2009-09-29 06:15
54502650	Sunset Resrts	80094561	Equipment	New	Approve	howard	2009-09-09	2009-09-29 06:15
11547561	Dr. Zivago Clinic	32424357	Equity	Closed	Hold	martinez	2009-09-10	2009-09-29 06:13
28069149	Funtime Productio	73137697	Mortgage	Open	Hold	lapin	2009-09-11	2009-09-29 06:13
54502650	Sunset Resrts	12203330	Mortgage	New	Hold	malone	2009-09-09	2009-09-29 06:11
91531361	Milfer Didlin	96321822	Equity	Denied	Intake	bratton	2009-09-10	2009-09-29 01:31

+

17 Row(s) Found

▼ ▲

Loan-36335451
Loan-80094561
Loan-12203330

Loan Details
Documents
Notes
Workflow

Customer Tesla Manufacturing Inc. - 1...

Type Term ▼

Status New ▼

Current Activity Intake

Assigned To kapoor ▼

Date 10/20/2009

Update

LOANS PROCESSING | Loans | Customers | Dashboard | CaseBook | Processors | Admin | scott Nov 19, 2009 20:13

Customer ID: Loan Number: Loan Type: -- Select -- Loan Status: -- Select -- Current Activity: -- Select -- Assigned To: -- Select -- From: To: Search Clear

Customer ID	Customer	Loan Number	Type	Status	Activity	Assigned To	Loan Date	Created
91531361	Milfer Didlin							2009-09-29 01:31
15568117	Super Transprtat							2009-09-29 01:09
11547561	Dr. Zivago Clinic							2009-09-29 01:08
39357296	Unreal Realtors							2009-09-29 01:07
28069149	Funtime Product							2009-09-29 01:03
55696093	Rourke Farmers I							2009-09-29 01:01
54502650	Sunset Resrts							2009-09-29 24:42
11547561	Dr. Zivago Clinic							2009-09-29 24:41
15011388	Tesla Manufactur							2009-09-29 24:39

7 Row(s) Found

Loan-36335451 | Loan-800945

Loan Details | **Documents**

Document Title	Document Type	Version	Assigned To	Last Modified Date
W2 Document				2009-09-29 11:22
Test Document				
Statement	Financial Statemer	1.0	Administrator	2009-09-29 24:52
Loan Application	Agreement	1.0	Administrator	2009-09-29 24:43

Document Title: Document Type: Select File

Add | CheckOut | Update | Clear

Select file to upload by p845demo

docs

Integran...	demo	docs	Test Ex...ent.xls
Integran...	docs	export.sql	Test Im...nt.bmp
jakarta-...	IBM IO...2008.xls		Test Im...ent.png
apache-...	logos		Test PD...ent.pdf
Moodys	PaperW...m 2006		Test Po...ent.ppt
NextCase	PaperW...roposal		Test Te...ent.txt
PACIFIC...	PaperW...sal v1.0		Test W...ent.doc
PAPERW...	PaperW...osal v2		
PERS	PaperW...sal v2.0		
Projects	PaperW...Services		
P8 40 C...	pictures		
STANDARD	PW JavaDocs		
VM	PWNNotes.txt		
VMShare	RUNTIMES		
VMShare35	Screenshots		
	templates		

Cancel | Select

LOANS PROCESSING

Loans | Customers | Dashboard | CaseBook | Processors | Admin

scott Nov 19, 2009 20:13

Customer ID

Loan Number

Loan Type

Loan Status

Current Activity

Assigned To

From

To

Search

Clear

-- Select --

-- Select -

-- Select --

-- Select

Customer ID	Customer	Loan Number	Type	Status	Activity	Assigned To	Loan Date	Created
91531361	Milfer Didlin	96321822	Equity	Denied	Intake	bratton	2009-09-10	2009-09-29 01:31
15568117	Super Transprtator	81890610	Equity	Closed	Approve	lapin	2009-09-15	2009-09-29 01:09
11547561	Dr. Zivago Clinic	94266017	Equipment	Open	Review	kapoor	2009-09-08	2009-09-29 01:08
39357296	Unreal Realtors	83420910	Equity	Hold	Hold	bernard	2009-09-11	2009-09-29 01:07
28069149	Funtime Productio	88756889	Refinance	Cancelled	Review	kapoor	2009-09-23	2009-09-29 01:03
55696093	Rourke Farmers LLC	92755826	Equity	Open	Intake	bernard	2009-09-16	2009-09-29 01:01
54502650	Sunset Resrts	68039304	Equity	Open	Intake	kapoor	2009-09-03	2009-09-29 24:42
11547561	Dr. Zivago Clinic	49022770	Equipment	Hold	Process	palmer	2009-09-08	2009-09-29 24:41
15011388	Tesla Manufacturing	37222471	Term	New	Hold	halpert	2009-09-29	2009-09-29 24:39

+

17 Row(s) Found

Loan-36335451
Loan-80094561
Loan-12203330
Loan-37222471
Loan-94266017

Loan Details
Documents
Notes
Workflow

Note Text	Added By	Date Added
Please hold	scott	2009-09-29 11:23
Test Note 3	scott	2009-09-29 24:58
Test Note 2	scott	2009-09-29 24:58
Test Note 1	scott	2009-09-29 24:58

Note Text

Working on the Loan

Add

LOANS PROCESSING

Loans | Customers | Dashboard | CaseBook | Processors | Admin

scott Nov 19, 2009 20:13

Customer ID

Loan Number

Loan Type

Loan Status

Current Activity

Assigned To

From

To

Customer ID	Customer	Loan Number	Type	Status	Activity	Assigned To	Loan Date	Created
91531361	Milfer Didlin	96321822	Equity	Denied	Intake	bratton	2009-09-10	2009-09-29 01:31
15568117	Super Transprtator	81890610	Equity	Closed	Approve	lapin	2009-09-15	2009-09-29 01:09
11547561	Dr. Zivago Clinic	94266017	Equipment	Open	Review	kapoor	2009-09-08	2009-09-29 01:08
39357296	Unreal Realtors	83420910	Equity	Hold	Hold	bernard	2009-09-11	2009-09-29 01:07
28069149	Funtime Productio	88756889	Refinance	Cancelled	Review	kapoor	2009-09-23	2009-09-29 01:03
55696093	Rourke Farmers LLC	92755826	Equity	Open	Intake	bernard	2009-09-16	2009-09-29 01:01
54502650	Sunset Resrts	68039304	Equity	Open	Intake	kapoor	2009-09-03	2009-09-29 24:42
11547561	Dr. Zivago Clinic	49022770	Equipment	Hold	Process	palmer	2009-09-08	2009-09-29 24:41
15011388	Tesla Manufacturing	37222471	Term	New	Hold	halpert	2009-09-29	2009-09-29 24:39

+
17 Row(s) Found

Loan-36335451
Loan-80094561
Loan-12203330
Loan-37222471
Loan-94266017

Loan Details
Documents
Notes
Workflow

Current Step Name	Enqueue Time	Route To	Comment
Hold	2009-10-03 18:06	<input type="text" value="-- Select --"/> <input type="button" value="v"/>	<input type="text"/>

Step	Enqueued	Event	Route To	UserId	Comment
Intake	2009-09-29 24:39	Saved		scott	Working on it
Intake	2009-09-29 24:58	Saved		scott	Still Working on it
Intake	2009-09-29 24:58	Completed		scott	Putting a hold on it
Hold	2009-09-29 24:59	Completed	2009-09-29 24:59	scott	Sending it for processing
Process	2009-09-29 24:59	Completed	2009-10-03 18:06	scott	

LOANS PROCESSING

Loans | Customers | Dashboard | CaseBook | Processors | Admin

scott Nov 19, 2009 20:13

Customer ID

Loan Number

Loan Type

Loan Status

Current Activity

Assigned To

From

To

Customer ID	Customer	Loan Number	Type	Status	Activity	Assigned To	Loan Date	Created
91531361	Milfer Didlin	96321822	Equity	Denied	Intake	bratton	2009-09-10	2009-09-29 01:31
15568117	Super Transprtator	81890610	Equity	Closed	Approve	lapin	2009-09-15	2009-09-29 01:09
11547561	Dr. Zivago Clinic	94266017	Equipment	Open	Review	kapoor	2009-09-08	2009-09-29 01:08
39357296	Unreal Realtors	83420910	Equity	Hold	Hold	bernard	2009-09-11	2009-09-29 01:07
28069149	Funtime Productio	88756889	Refinance	Cancelled	Review	kapoor	2009-09-23	2009-09-29 01:03
55696093	Rourke Farmers LL	92755826	Equity	Open	Intake	bernard	2009-09-16	2009-09-29 01:01
54502650	Sunset Resrts	68039304	Equity	Open	Intake	kapoor	2009-09-03	2009-09-29 24:42
11547561	Dr. Zivago Clinic	49022770	Equipment	Hold	Process	palmer	2009-09-08	2009-09-29 24:41
15011388	Tesla Manufacturing	37222471	Term	New	Hold	halpert	2009-09-29	2009-09-29 24:39

17 Row(s) Found

Loan-68039304

Loan-94266017

New Loan

Customer

Type

Status

Assigned To

Date

LOANS PROCESSING | [Loans](#) | [Customers](#) | [Dashboard](#) | [CaseBook](#) | [Processors](#) | [Admin](#) scott Nov 19, 2009 20:13

Customer ID: Customer Name: From: To:

Customer ID	Customer Name	Address	City	State	Zip	Created
36852416	Small Time Construction	2343 Brick Road	Rome	DE	89895	2009-10-18 11:54
75051379	BigTime Construction Cc	2343 Brick Road	Rome	DE	89895	2009-09-29 24:37
15568117	Super Transprtaton LLC	2143 Fast Lane	Daytona	OH	78784	2009-09-29 24:34
39357296	Unreal Realtors	565 Big Brokrs Rd.	Detroit	MI	45654	2009-09-29 24:33
54502650	Sunset Resrts	2323 Beach Road	Miami	FL	56778	2009-09-29 24:31
91531361	Milfer Didlin	3434 Main St	Scranton	NJ	45455	2009-09-29 24:30
28069149	Funtime Productions	3434 Hollywood Blvd	Los Angeles	CA	34553	2009-09-29 24:07
15011388	Tesla Manufacturing Inc.	34543 Industrial Lane	Pittsburgh	PA	56567	2009-09-29 24:05
11547561	Dr. Zivago Clinic	23213 Kremlin Rd.	Moscow	LA	68768	2009-09-29 24:02

10 Row(s) Found

Customer-36852416 | **Customer-91531361** | **Customer-54502650** | **Customer-55696093** | **Customer-91531361** | **Customer-15568117**

Name *
Address
City
State
Zip
Phone
EMail

LOANS PROCESSING [Loans](#) | [Customers](#) | [Dashboard](#) | [CaseBook](#) | [Processors](#) | [Admin](#) scott Nov 19, 2009 21:30

Customer ID Customer Name From To

Customer ID	Customer Name	Address	City	State	Zip	Created
36852416	Small Time Construction	2343 Brick Road	Rome	DE	89895	2009-10-18 11:54
75051379	BigTime Construction Co	2343 Brick Road	Rome	DE	89895	2009-09-29 24:37
15568117	Super Transprtaton LLC	2143 Fast Lane	Daytona	OH	78784	2009-09-29 24:34
39357296	Unreal Realtors	565 Big Brokrs Rd.	Detroit	MI	45654	2009-09-29 24:33
54502650	Sunset Resrts	2323 Beach Road	Miami	FL	56778	2009-09-29 24:31
91531361	Milfer Didlin	3434 Main St	Scranton	NJ	45455	2009-09-29 24:30
28069149	Funtime Productions	3434 Hollywood Blvd	Los Angeles	CA	34553	2009-09-29 24:07
15011388	Tesla Manufacturing Inc.	34543 Industrial Lane	Pittsburgh	PA	56567	2009-09-29 24:05
11547561	Dr. Zivago Clinic	23213 Kremlin Rd.	Moscow	LA	68768	2009-09-29 24:02

+ 10 Row(s) Found

Customer-36852416 **Customer-39357296** **Customer-15011388** **New Customer**

Name *

Address

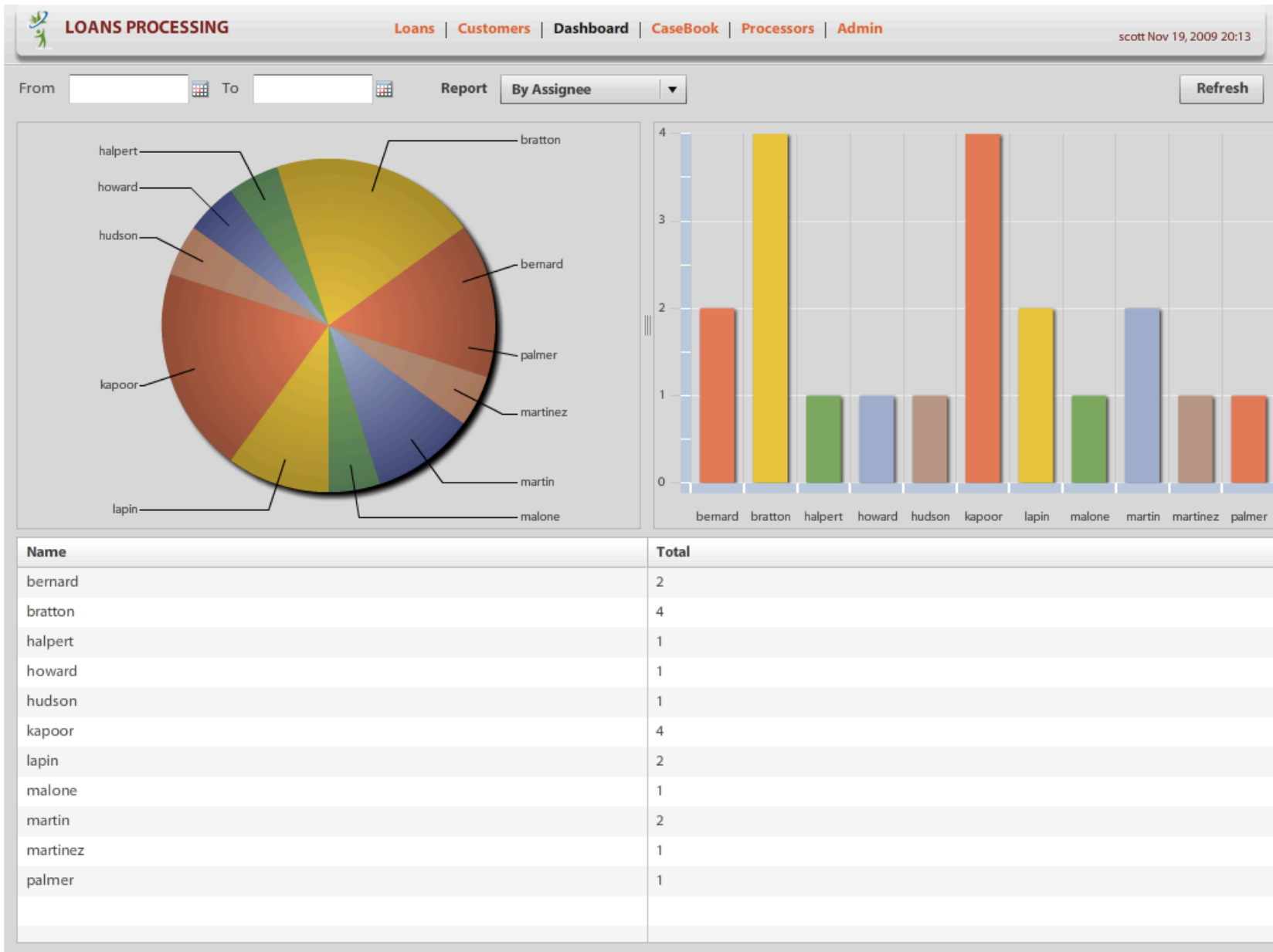
City

State ▼

Zip

Phone

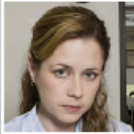
E-Mail





Wall

Loan-92755826



Pam Beesly 2009-10-18 17:17

Added the Doc: Important Doc [Loan 32424357](#)

[2 Comments](#)



Ryan Howard 2009-10-18 17:15

Updated Loan Details [Loan 73137697](#)

[Comments](#)



Pam Beesly 2009-10-18 18:19

Hey Ryan, Kelly wants you to call her about this one

Comment



Michael Scott 2009-10-18 17:14

Updated Loan Details [Loan 49022770](#)

[Add Comments](#)



Michael Scott 2009-10-18 17:12

Updated Loan Details [Loan 80094561](#)

[Comments](#)



Ryan Howard 2009-10-18 17:14

Hey Mike



Michael Scott 2009-10-18 17:12

Test Comment 1

Comment

Refresh

LOANS PROCESSING [Loans](#) | [Customers](#) | [Dashboard](#) | [CaseBook](#) | [Processors](#) | [Admin](#) scott Nov 19, 2009 20:13

User Id First Name Last Name

Userid	First Name	Last Name	Role	Departmnet	EMail	Created
scott	Michael	Scott	Supervisor	Laons	michael@dundermifflin.c	2009-10-05 18:23
martin	Angela	martin	Supervisor	Laons	angela@dundermifflin.cc	2009-10-04 15:37
hudson	Stanley	Hudson	Supervisor	Laons	stanley@dundermifflin.cc	2009-10-04 15:27
beesly	Pam	Beesly	Supervisor	Laons	pam@dundermifflin.com	2009-10-04 15:27
bratton	Creed	Bratton	Loan Clerk	Loans	creed@dundermifflin.cor	2009-09-29 01:22
Administrator	Hari	Kolasani	Admin	Loans	admin@loans.com	2009-09-29 24:57
howard	Ryan	Howard	Loans Officer	Loans	ryan@dundermifflin.com	2009-09-28 23:20
lapin	Phylis	Lapin	Loans Clerk	Loans	phyllis@dundermifflin.co	2009-09-28 23:19
martinez	Oscar	Martinez	Loans Officer	Loans	oscar@dundermifflin.con	2009-09-28 23:17

+ 14 Row(s) Found

scott Administrator scott

User Id *


First Name


Last Name

Role

Department

E-Mail

Upload Image *  [Select File](#)





Loan Types

Type Name

Equipment

Equity

Mortgage

New Type

Refinance

Term

Term2

[Click to Add New Type](#)

Loan Statuses

Status Name

Approved

Cancelled

Closed

Denied

Hold

New

Open

Pending

[Click to Add New Status](#)

Loan Activities

Activity Name

Approve

Finalize

Hold

Intake

Process

Review

[Click to Add New Activity](#)

Loan Document Types

Document Type Name

Agreement

Financial Statement

Guarantee

Lease Agreement

Property Certificate

W2

[Click to Add New DocumentType](#)