

# **Onboarding Studio**

Manage critical loan origination data more effectively and transform your STP and the speed of your organization

## Get automated and complete onboarding functionality for your loans

Post-loan decisioning, Onboarding Studio takes credit agreement data from your loan origination source such as enterprise origination solutions, manual data entry, spreadsheets, etc., and maps it to your target loan accounting system, defaulting, deriving, and/or transforming the source data needed to service your loans.

Many banks lack a quick and easy way to get credit agreement data into their loan accounting system. The length of time required to onboard information to the target loan accounting system takes too long, and the amount of double key entry of information gathered in the origination system is cumbersome and prone to clerical errors.

QuadraGen's Onboarding Studio automates data collection required by the servicing system and eliminates dual data entry from origination to servicing. It allows you to onboard new clients as well as manage amendments to existing deals and facilities or accounts. This helps clients increase the speed of onboarding and reduces operational risk due to clerical errors, resulting in better user and customer experience.

DNBOARDING STUDIO				AWS DEVELOPMENT
<ul> <li>Administration</li> <li>My Dashboard</li> </ul>	The Lending Practice, LLC			🗰 Setup 🛛 🖉 User Permissions 🔲 🌄 Status 👻
Requests Customers	All Customers / The Lending Practice, LLC			
Deals	The Lending Practice, LLC	Legal Address	Paper Orthodontics	Melville, New York
<ul> <li>Facilities</li> <li>Accounts</li> </ul>	LEGAL NAME: The Lending Practice, LLC CID: 1	445 Broad Hollow Road Ste 25, Melville, NY, US, 11747	BankUnited	
Amendments	CUSTOMER NUMBER: 10001 STOCK PRICE: None STATUS: Active	PHONE #: 6463616699 FAX #: 6463619999	nercial O Huntington Quadrangle - Melville Northwe	
REPORTS			Google Map data @2021 Terms of Use Report a map erro	
Report Logs	Customer Summary Addresses Contacts	Remittance Instructions Servicing Grou	ups Profiles Additional Information Commen	nts
🕈 Report Builder	Summary of The Lending Practice,	, LLC		
ONBOARDINGSTUDIO APIS	LEGAL NAME:	BRANCH:	SHORT NAME:	EXPENSE CODE:
API Documentation	The Lending Practice, LLC	001 Naples Florida	THE LENDING PRACTICE 2021	001-100 Corporate \$
API and Xquery List		DEPARTMENT:	LOAN IQ STATUS:	BUSINESS CLASSIFICATION:
🗿 Hypermedia API		001 Naples Florida	♦ Active	Limited Liability Co.
	INDUSTRY CODE: 522110: Commercial Banking			
ARR CALCULATOR				
ARR Hypermedia API				
ARR Hypermedia API				

# Features

- Flexible APIs allow for easy data injection from various source origination systems.
- Request Dashboards facilitate navigation of complex lending structures for end-user review and data enrichment for multiple request types.
- Progress Indicators alert end-users when incomplete or incorrect information may cause problems with the onboarding processing system.
- Maker/check process reduces fraudulent entry into the servicing system. Lets you onboard new deal creation amendments, and entity maintenance participations/ syndications.



Decreases onboarding time by allowing

commitments, and accounts to book at

the same time through parallelization.

User Dashboards provide a one-stop shop to view onboarding requests in

multiple customers, agreements,

various statuses.

#### **Benefits**

- Single location for reviewing all onboarding requests.
- Manual double key entry of data from source origination system is eliminated.
- Modern UI and workflows.
- Loan team can be directed to more high level tasks or eliminated for cost savings.
- Improves STP and compliance requirements.

Administration	Book Deals and Facilities On	boarding Re	equest 9081	🗰 Setup 🛛 🕲 User Permissions 🔲 🍸 Status				
My Dashboard								
Requests	Dashboard / Requests / Onboarding Request 9081							
Customers	Dashboard / Requests / Onboa	arding Request 90	001					
P Deals								
Facilities								
Accounts	Complete		Complete		Complete		Complete	
Amendments	100%		100%		100%		100%	
EPORTS	1 Customer		1 Deal		1 Facility		3 Accounts	
Report Console								
Report Logs	Customer Summary	0	Deal Summary	0	Facility Summary	0	Account Summary	8
🕈 Report Builder	Addresses	0	Fees	0	Limits	6	Adjusted Porfolio Shares	0
ONBOARDINGSTUDIO APIS	Contacts	0	Pricing Rules	0	Pricing Details	3	Repayment Schedules	0
API Documentation	Remittance Instructions	G	Payment Rules	0	Related Parties	0	Additional Information	3
API and Xquery List	Servicing Groups	0	Related Parties	2	Risk	2		
Hypermedia API	Servicing Groups		Related Parties		KISK			
RR CALCULATOR	Profiles	0	Risk	0	Additional Information	6		
ARR Calculator	Additional Information	2						

### **Use Cases**

Onboarding Studio solves for the following use cases:

#### 1. New Deal Creation

Creates new or existing customers and associates them with new deals/agreements, facilities/commitments, or accounts/ loans/deposits.

2. Deal Amendments

Creates amendments to existing credit agreements and associates transactions that modify the terms of agreements, commitments, and accounts using configurable scenarios such as Renewals, Assumptions, and Rate Conversions.

To learn more contact Wes Eberlin at wes.eberlin@quadragen.com

3. Entity Maintenance Maintains customer data su

Maintains customer data such as customer summary, addresses, servicing contacts and groups, payment instructions, and additional information.

4. **Syndication/Participations Onboarding** Collects investment allocations and entity relationships for onboarding to the servicing system where investment shares are used in syndicated and participated loans.

