

Transforming Manual Processes with Digital Partner Portal

Currently our client-partners are onboarding manually and their records are maintained and updated manually which increases the operational cost and human error. This manual approach also results in delays in receiving necessary paperwork, approvals and other crucial factors.

Skillmine Solution

To address this challenge we have developed a website called Partner Portal which allows their partners/individuals to do online registration at their convenience and submit their information immediately by providing consent to our client. They can do corrections as needed without worrying. The information updated by them will be immediately loaded into a database.

The screenshot shows a registration form titled "Individual Details". At the top, there is a progress bar with four steps: "Registration" (active), "Individual Details", "Company Details", and "Bank Details". Below the progress bar, the form fields are organized into a grid. The first row contains "First Name*", "Last Name*", "Mobile No.*" (with a pre-filled number "+91- 8074638963"), and "Email ID*". The second row contains "Gender*" (a dropdown menu), "PAN*" (with a pre-filled value "GFGHF7667G"), "Aadhaar No*" (with a placeholder "Enter Aadhaar No"), and "Date Of Birth*" (with a placeholder "dd-mm-yyyy" and a calendar icon). The third row contains "Address Line 1*", "Address Line 2*", "Address Line 3*", and "Landmark*". The fourth row contains "Postal Code*", "City / Town*", and "State*". Each field has a placeholder text indicating where to enter the information.

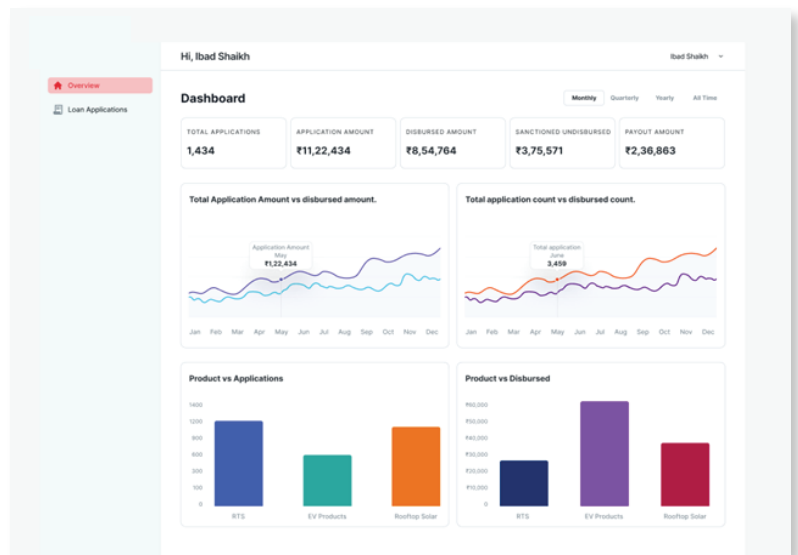
The screenshot shows an "Overview" dashboard for a user named "ASHV". The dashboard has a sidebar with navigation links: "Overview" (active), "Application Review", "Sanction", "E-Sign", and "Empanelment". The main content area is divided into three columns: "Application Collection", "Evidence Review", and "Progress". Each column contains several cards representing different verification steps. The "Application Collection" column includes "Details Verification", "ID Verification, Penny Drop", and "CBI Score Fetch". The "Evidence Review" column includes "FCU Verification", "CPU Verification", and "Sanction". The "Progress" column includes "Payout Structure" and "E-Sign". Each card displays a "Due Date" (21/08/2023), "Last Updated" time (30 mins ago), and a progress indicator (e.g., #1, #2, #3).

All Partners/individual whose partnership type-Sole proprietor/Partnership/LLP/Public LTD/Private LTD can onboard/register themselves through this portal by providing Individual/director and company details and bank details and KYC documents can be submitted while registration.

Our Client can view all the registered applications and verify their details through Portal by login using role based access and sanction the applications/reject them and maintain the records in portal accordingly.

Internally we are verifying Aadhaar/PAN Email and show the status in UI.

Once application is approved and empanelment code is generated then partner/individual can login to the portal and view his dashboard and his loan applications.



Benefits

- Partner Portal helps our client to maintain all information about their partners/individual at one platform and supports partner engagement and reduce error.
- It reduces manual operations and paper work and operational cost.
- Applications can be tracked by the team easily at one platform based on role.
- Reviewing of applications can be done easily at one place and track status if each application.
- Partners can view their loan applications and applications data analysis can be done through dashboard .
- Analytics: Detailed analytics reports helps partners to identify areas for improvement, leading to more revenue opportunities for our client and partners of our client.

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