

Financial services

Fill out an application

Version 8.0



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PRODUCTS: **LENDING**

The [*Application forms*] section is designed for storing information about deal participants mentioned in the applications. Use this section to view and edit detailed information that the deal participants submitted along with the application, and make an informed decision on whether to grant or deny loans. Filling out an application form when [creating an application](#) for a bank product is covered in a separate article. A bank manager fills in the application form based on the information provided by the customer. Alternatively, you can copy the information from the application form filled out by the customer. You can customize templates for printing [application forms](#) and other documents. The templates can be printed directly from the document page. The application form page contains participants' profiles, applications, and several tabs.

By default, the section is available in the [*Supervisor*] workspace.

The borrower's application form is created automatically on the "Filling in the application form" stage of application processing. To add application form:

1. 1. Open the [Participants and documents] tab and click [+] in the [Application forms] detail. Select the type of deal participant. A new application form page will open. Select the [New Contact] checkbox if there is not contact record for the deal participant in the system yet (a new contact record will be automatically created after you close the deal).
If you clear the [New contact], select an existing contact in the [Contact] field. All relevant contact information will be automatically copied to the application form.
2. Fill in the required fields on the [Contact info] tab:
 - a. [Last name]
 - b. [First name]
 - c. [Birth date]
 - d. [Birthplace]
 - e. [Gender]
 - f. [Citizenship]
 - g. [Social status]
 - h. [Education]
3. Enter contact's ID data in the [ID] fields block.
4. If required, fill in fields on other tabs.
5. Add a photo of the borrower.
6. Save the profile.

In the application form created as part of a case, the borrower's document bundle required for application processing will be generated automatically. The required documents for the deal will be automatically added to the application form after confirming the application.