

OS ONBOARDING STUDIO

Loan onboarding for the full deal lifecycle.

New deal creation, deal amendments, and customer maintenance — straight through to Loan IQ™ in **minutes, not days**.

THE CHALLENGE

New deals have a process. Amendments don't.

- 75% of boarding — amendments & customer maintenance — runs off-process
- Spreadsheets, email chains, and manual re-entry between systems
- Errors creep in, audit trails go missing, every amendment restarts the cycle

THE SOLUTION

One pipeline for every boarding event.

- Single intake — new deals, amendments, customer maintenance
- **Automated booking** straight through to Loan IQ™
- Dual-control approval, real-time queue visibility
- Zero core modifications — ready in weeks

HOW IT WORKS

SOURCE → REST → PIPELINE → LOAN IQ™

SOURCE SYSTEMS

CREATE

~25% of volume

CRM

Origination Systems

Supporting Systems

AMEND

~75% of volume

Deal Amendments

Customer Maintenance

Participation Trades

REST
API

OS ONBOARDING STUDIO

Create

Amend

USER INTERFACE

Dashboards & Queues

Request Dashboards

PROCESSING PIPELINE

Data Mapping & Transformation

Error Handling & Exception Routing

Approval Process

Enrichment & Booking Staging

AUTOMATED BOOKING TO LOAN IQ

INFRASTRUCTURE

REST APIs

Database

Workflow Engine

Containerized Deployment

Full audit trail · role-based security
data persistence · ready in weeks

AUTO-CREATED IN LOAN IQ

NEW DEALS

Customers & Entities

Deals & Facilities

Pending Outstandings

Accruals Active

AMENDMENTS & MAINTENANCE

Deal Amendments

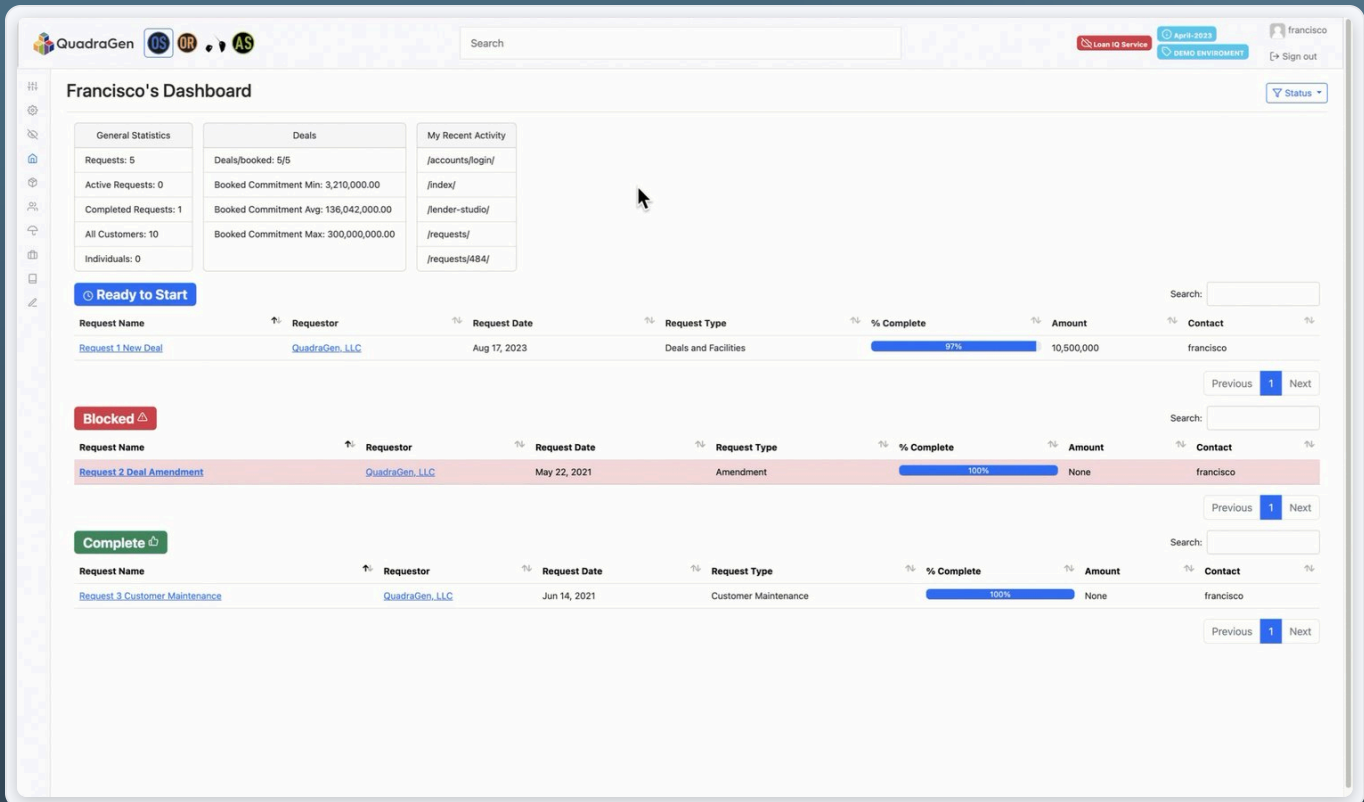
Facility Changes

Loan Repricing

Customer Maintenance

INSIDE ONBOARDING STUDIO · USER DASHBOARD

READY TO START · BLOCKED · COMPLETE



Francisco's Dashboard

General Statistics

- Requests: 5
- Active Requests: 0
- Completed Requests: 1
- All Customers: 10
- Individuals: 0

Deals

- Deals/booked: 5/5
- Booked Commitment Min: 3,210,000.00
- Booked Commitment Avg: 136,042,000.00
- Booked Commitment Max: 300,000,000.00

My Recent Activity

- /accounts/login/
- /index/
- /lender-studio/
- /requests/
- /requests/484/

Ready to Start

Request Name	Requestor	Request Date	Request Type	% Complete	Amount	Contact
Request 1 New Deal	QuadraGen, LLC	Aug 17, 2023	Deals and Facilities	97%	10,500,000	francisco

Blocked

Request Name	Requestor	Request Date	Request Type	% Complete	Amount	Contact
Request 2 Deal Amendment	QuadraGen, LLC	May 22, 2021	Amendment	100%	None	francisco

Complete

Request Name	Requestor	Request Date	Request Type	% Complete	Amount	Contact
Request 3 Customer Maintenance	QuadraGen, LLC	Jun 14, 2021	Customer Maintenance	100%	None	francisco

Personalized Dashboards

Every user sees their own queue — in progress, blocked, complete — at a glance.

Status-Based Routing

Blocked items surface immediately. Everything that needs attention is in one place.

Every Event Type, One View

New deals, amendments, and customer maintenance flow through a single interface.

OPERATIONAL OUTCOMES

One Entry, One Pipeline

New deals, amendments, and customer maintenance flow through a single interface — normalized before Loan IQ™ ever sees it.


Real-Time Pipeline Visibility

Dashboards and task queues replace email threads — every deal's status visible at a glance.


Dual-Control From Day One

Two-person, four-eyes review built into every workflow from day one — not retrofitted later.


Zero Core Modifications

Sits alongside Loan IQ™ — no SDK changes, no upgrade disruptions. Ready in weeks, not years.

PRODUCTION THROUGHPUT · LIVE DEPLOYMENTS

189

AVG. DAILY TASKS

670+

PEAK DAY TASKS

43K+

DEALS ANNUALLY

Every number above comes from a production deployment — not a projection.