🏛 Investment Bank - Mortgages

Business Requirement

The investment bank had different interfaces for different stakeholders. All of them were web- based screens. No Application Program Interface (API) based solutions were used to integrate the different lender systems.

Therefore, as part of the process of applying for a mortgage, customer's staff had to manually enter details on target websites, most of which was on Sage CRM system.

The Challenges

- Considerable time and effort was needed to manually enter data, which was already captured on another system. The manually entry from SAGE made the process labour intensive and error-prone.
- Customer was aware that, if the CRM data was mapped to each target web application, RPA could extract the relevant information from their CRM and enter it selectively on each screen as required.

Avenir Solution   Avenir designed and deployed the solution over three working days:

Day One

- Initial discussion and investigation regarding the business process.
- Steps 1 to 6 (out of 15) were created.

Day Two

- Further testing and performance enhancement.
- Final corrections to Steps 1 to 14.

Day Two

- Steps 7 to 14 created.
- Customer review and correction/amendment of some financial data.
- Demonstration of PPV to customer executives.

- Step 15 created.
- Final testing completed, all information secured, all tasks uploaded to the control room.
- Final video capture made of the end-to-end process and sent to customer project leaders.