

# 00. Table of Contents

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## Spek

### Definition

[01. Global Search](#)

[02. Convert to Product Package](#)

[03. Is a Product Package necessary for one loan](#)

[04. Why isn't my Lead converting?](#)

[05. How to search for existing records for a Prospect](#)

[06. How to check if a Loan Facility is Review Ready](#)

[07. How to Submit For Approval](#)

[08. What if I want to do more than one Loan at a time?](#)

[09. I clicked the Convert button and my screen went gray](#)

[10. How do I add a new Loan to my Product Package?](#)

[11. Why can't I add a new facility?](#)

[12. Contact Roles](#)

[13. Top things users do when viewing a Relationship record](#)

[14. How to add documents to Document Manager](#)

[15. How to add Products & Services](#)

[16. How to add a Contact](#)

[17. How to manage Connections](#)

[18. Customer Portal: How to Portal Enable Placeholders](#)

# 01. Global Search

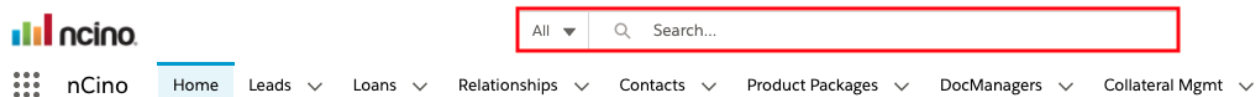
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## Spek

### Definition

**It's always important to first use the Global Search and do not create a record (Relationship, Lead, etc.) that already exists**

**ALWAYS** do the Global Search first before you start anything new  
Enter the name, company, TIN number, Social Security Number  
The TIN number and/or SSN is used a lot because they are unique  
Names can show duplicates which can be quite confusing



## 02. Convert to Product Package

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### Spek

### Definition

- When a **Lead** is being converted directly to a **Product Package**, it creates a **Loan** as well
- This means they are ready to start the application process
- You **do not** want to do the conversion until they are ready to proceed

*If the above criteria is met, you can proceed with the steps below*

- On the **Lead** record you wish to convert to a **Product Package**

1) Click ▼ to show the drop down

2) Click **Convert to Product Package**

The screenshot displays the nCino CRM interface. At the top, there is a search bar and navigation tabs for Home, Leads, Loans, Relationships, Contacts, Product Packages, DocManagers, Collateral Mgmt, Reports, Dashboards, and More. The main content area shows a lead record for Bryan Whittenton, CEO of Whittenton Capital Management. The record includes fields for Title, Company, and Email. Below the record, there is a progress bar with stages: Open, Unqualified, and Conve. The 'Change Owner' dropdown menu is open, showing options: Change Record Type, Check for New Data, Printable View, and Convert to Product Package. The 'Convert to Product Package' option is highlighted with a red box, and a red arrow points from the dropdown arrow to this option.

# 03. Is a Product Package necessary for one loan?

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## Spek

### Definition

**Question:** If I only have one loan, do I need to have a **Product Package**?

**Answer:** You must create a **Product Package** even if it's for one loan

### In the Product Package you:

- Submit for approval
- Generate the credit memo
- Where Portfolio Management/Credit Actions are done (like Annual Reviews, Renewals and Modifications)

# 04. Why isn't my Lead converting?

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## Spek

### Definition

- From the **Product Selection** section on the **Details** tab on the **Lead** record
- When the **Product Line**, **Product Type**, and **Product** values are selected you can convert the **Lead**
- If the three fields are not populated with values, you **cannot** convert the **Lead**