



SV Tech Soft provides Salesforce nCino Commercial Configuration Online Training course is good and gets through a lot of material and detail explanation.

nCino Becomes Salesforce.com OEM Partner. As a Salesforce OEM (Original Equipment Manufacturer) partner, nCino built its Bank Operating System on the Force.com platform and quickly became Salesforce’s leading partner for financial services.

| SNO | Session Title | Topics to Cover |
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| 1 | Work With Households | <ul style="list-style-type: none"> • With the Households feature, you can use Connections to group relationships together into a “household.” • For example, you might group a customer’s account, her husband’s account, and their businesses into a household. By doing so, the household calculates values across all of the entities in the household, which reveals aggregated exposure and product information for the connected relationships. This way, you can understand the total proposed exposure for an entity and accurately calculate contingent exposure without under or over estimating. |
| 2 | Toggle Loan Name ON/OFF | nCino’s Loan Creation page allows for customizations, such as adding new fields via field sets and hiding the Loan Name with the use of custom settings. While configuration is minimal, there is a great impact for your financial institution’s users. |
| 3 | Display Additional Loan Fields | nCino’s Loan Creation page allows for |

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| | | customizations, such as adding new fields via field sets and hiding the Loan Name with the use of custom settings. While configuration is minimal, there is a great impact for your financial institution's users. |
| 4 | Working with Entity Involvement | <ol style="list-style-type: none"> 1. Entity Involvement, where we can easily view and manage the relationships and authorized signers connected to your loans. 2. financial institutions have more control over their user experience and even more options for customization. |
| 5 | Configure the Product Catalog | The nCino Product Catalog provides structure to the catalog of products a financial institution offers. Across all solutions available in the nCino Bank Operating System, you can create product lines, add product types within those product lines, and then create individual products that fit into each product type categorization. |
| 6 | Stage-change validation Rule | validation rule to only fire when moving from one specified stage to another specified stage instead of firing during any stage changes. |
| 7 | Configure a Team Loan Alert | <p>Using nCino's Team Alert feature, one or more Loan Team Members are sent an email when desired Loan conditions are met. Examples of this feature include:</p> <ol style="list-style-type: none"> 1. Notify all Loan Team Members when a New Loan Team Member is added 2. Notify all Loan Team Members when the loan's stage changes to Booked 3. Notify the Credit Underwriter when the stage changes to Underwriting 4. Notify Loan Operations when the stage changes to Pre-Closing Review |
| 8 | Configure Standard Fee | <ol style="list-style-type: none"> 1. Customers can use Fee Management to set standard fees based on product and enter multiple fees at a time. Users can add fees to both consumer and commercial loans. 2. nCino's Fee Management page in the nCino Administration Dashboard allows administrators to: <ol style="list-style-type: none"> 1. Set up the fee template (standard fees) based on product |

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| | | <ol style="list-style-type: none"> 2. Set up standard fees to be applied at specific loan stages 3. Set up standard fees to be active or inactive based on dates, allowing users to plan for fee changes in advance |
| 9 | Configure Covenant Management | This configuration options for Covenant Management. Covenants are agreements based around a loan. For example, a covenant might be a requirement for the borrower to provide a tax return every year on a certain date in order to uphold the terms and conditions of the loan. Covenant compliance measures whether or not this requirement is met. With the Covenant Management structure, a user can add multiple covenants at a time and automatically generate compliance records. |
| 10 | Configure Collateral Types | Collateral Type is an object that helps your financial institution categorize collateral management records. Based on the types and subtypes you create, you can further customize your collateral management experience. You can configure different field sets to conditionally render based on type, and you can filter searches based on collateral types. |
| 11 | Update Facilities Views | nCino allows for customizations when end users create a New Facility and New Limit/Sublimit/Takedown. You can add new fields via field sets and hide the Loan Name with the use of custom settings with these customizations. While configuration is minimal, there is a great impact for your financial institution's users. |
| 12 | Configure Edit Facility Model | nCino allows for customizations when end users create a New Facility and New Limit/Sublimit/Takedown. You can add new fields via field sets and hide the Loan Name with the use of custom settings with these customizations. While configuration is minimal, there is a great impact for your financial institution's users. |
| 13 | Configure Document Manager | Document Manager is nCino's drag-and-drop storage solution for all loan, collateral, relationship, product package, treasury, and deposit account opening files. Document Manager dynamically renders document placeholders based on your desired criteria, and |

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| | | allows financial institutions to store documents (or their externally stored links) for individual objects on the corresponding record page. |
| 14 | Add an Administrative Section to the Credit Memo | nCino's Credit Memo feature offers a streamlined experience to create and configure credit memo templates without custom code. Since each financial institution uses Credit Memo differently, you can configure custom credit memo templates tailored to the needs of your institution's credit review policy. |
| 15 | Configure a New Form Template | <p>1. With Form Generation, an end user can generate a form that automatically populates with information from data entered into the nCino system.</p> <p>2. This training covers how to:</p> <ol style="list-style-type: none"> 1. Insert tags into templates for automatic data population from nCino. 2. Use the Forms Manager tab to upload and manage the templates. 3. Configure the optional Generated Forms to Document Manager feature. |
| 16 | Build a User Interface | <p>1. The User Interface (UI) of a software application typically encompasses all the ways a user interacts with the application. For example, buttons on the screen and navigation bars. The nCino User Interface streamlines all lines of business and related processes from beginning to end, improving the overall experience for financial institutions and their customers</p> <p>2. nCino User Interface: Allows for customization based on your existing process and procedures, including by role in conjunction with Salesforce, the nCino UI can leverage nCino on any mobile device allowing the same functionality in the office or on the go</p> |
| 17 | Set a Route to Conditionally Render | nCino provided the configuration to conditionally display tabs, sub-tabs and fields according to some condition. |
| 18 | Set the Loan Purpose to Read Only | Configuration to set field level access in nCino UI. |

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