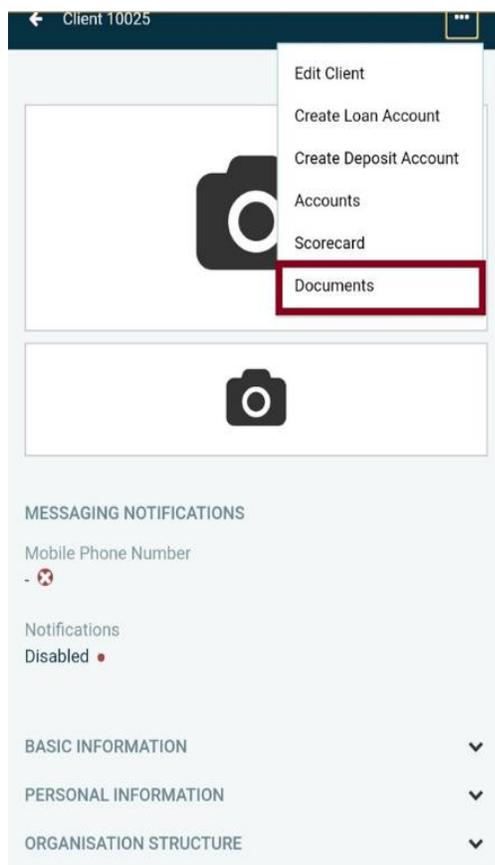**Document Management for Clients and Loans**

The document upload functionality in IFOA operates in accordance with the 'Document Configuration' settings in Instafin and the 'Document Management' user group permissions.
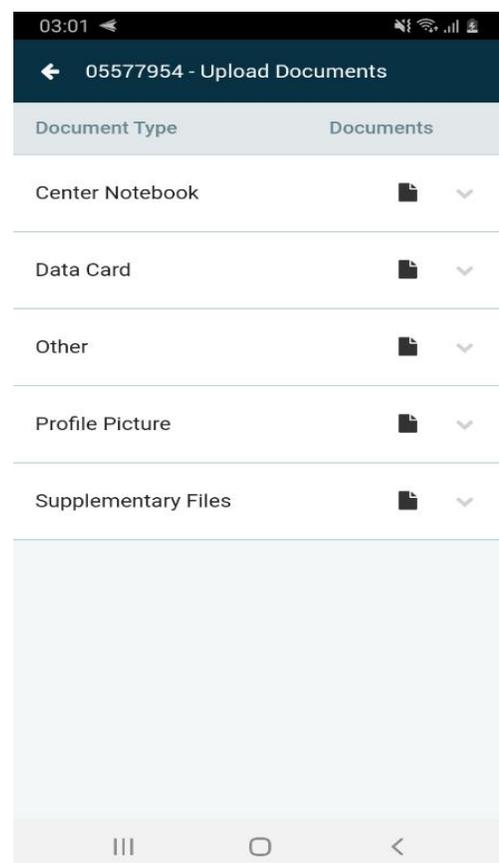
This feature enables more efficient document uploads, allowing photos to be captured directly in the field rather than being restricted to office locations. It also helps streamline client onboarding and loan approval processes, saving time and improving workflow efficiency.
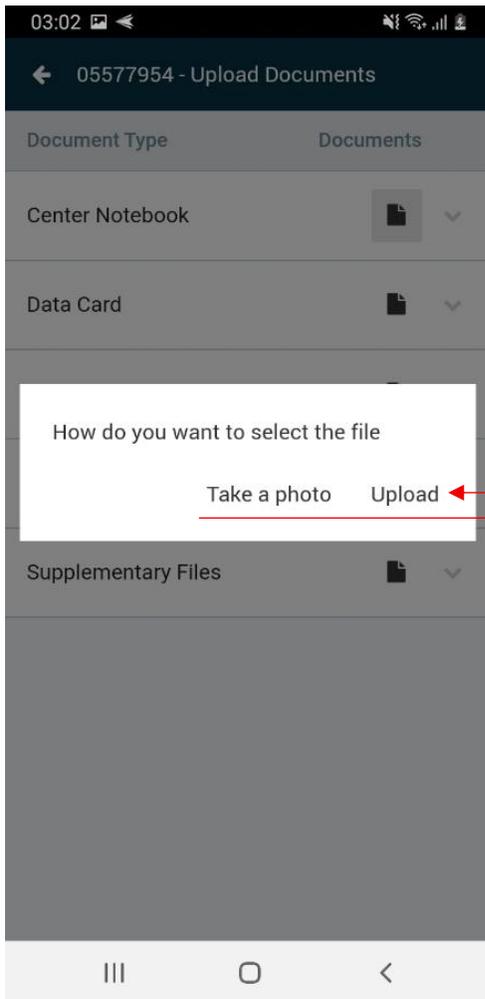
► Once the steps above are completed, navigate to an **Individual Client** or **loan account dashboard** and click on '**Documents**' in the top-right corner.

► Clicking '**Documents**' will open a page displaying a list of all active Document Types for the selected Individual Client or loan product.

► '**Other**' is a default document type in Instafin, used for miscellaneous documents.

Upload a File

▶ To add a document, click the icon under the "**Documents**" for the corresponding document type.
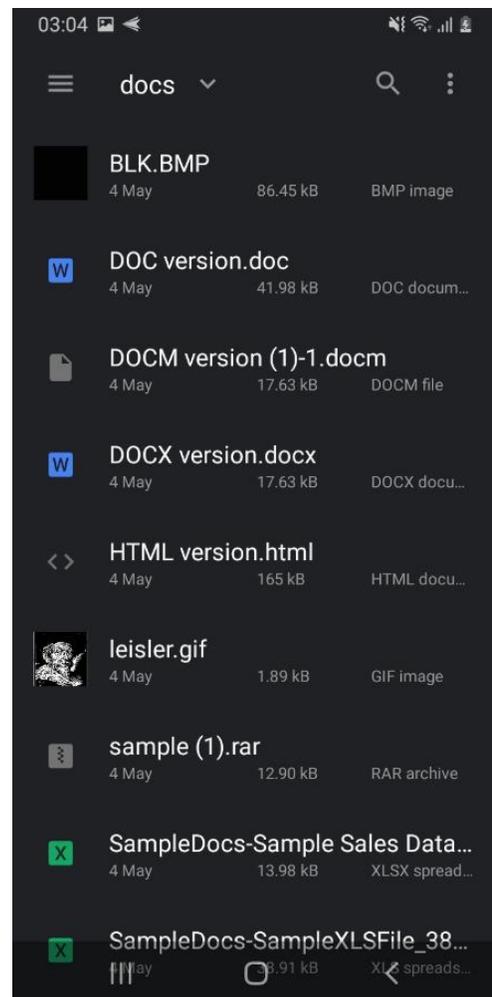
Take a Photo

▶ Selecting this option will open your device's camera so you can capture a photo.

▶ After taking the photo, you can either retake it or confirm the current image.

▶ Once confirmed, the photo will appear with cropping options, and you can again choose to cancel or confirm the final version.

Uploading a Document

▶ If you choose "**Upload**", your device's documents folder will open, allowing you to select a file to upload.

The following file types are supported for documents (same as in Instafin):

- png, jpg, webp, tif, bmp, gif
- doc, docm, docx, html, text, txt
- xls, xlsx, xlsb, xlsm, csv
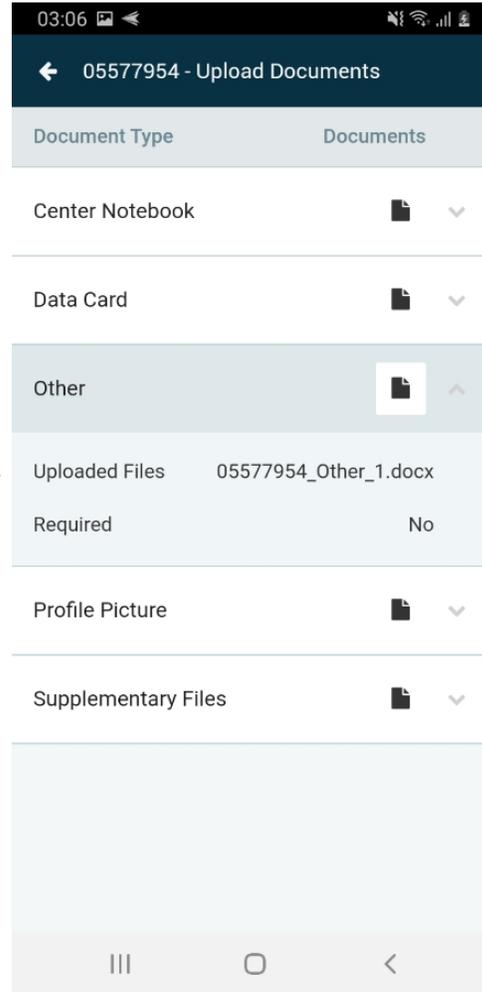- pptx
- xml, json, rar

Syncing Uploaded Documents

▶ After taking a photo or uploading a file, **perform a sync** to ensure your document is saved to Instafin.

▶ Once synced, the file names will appear under "**Uploaded Files**."

Note:

- Document photos can only be downloaded in Instafin.

- In IFOA, photos can only be uploaded, not downloaded.

- -

Acknowledgement and Approval

This **Capture or Upload Document in IFOA** Standard Operating Procedure (SOP) has been reviewed and approved by the authorized signatories. Their signatures confirm acceptance of its content and authorize its official implementation.

Prepared by:

Reviewed and enhanced by:

JORISH PAUL E. BANAT
MIS Junior Officer

ALSIVATATA A. SAPPAYANI
MIS Senior Officer

Noted by:

Approved by:

NUR-ALIN A. MATBA
Legal Unit Head

MERCEDES G. FAUSTINO
President and CEO

CATHERINE A. ELUMBRA
Operations Director

KMFI-MIS, Capture or Upload Document in IFOA, Original version 17 Jan 2025.

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