



Car Loan Pre-Approvals – Process Template

Readme

Version 2.0

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1. Introduction

This document contains all essential information for the user to make full use of 'Car Loan Pre-Approvals' process template. It includes a description of the functions and capabilities and step-by-step procedures for setup & configuration of the template.

1.1 Overview

This template lets you build an end-to-end process automation to efficiently and quickly pre-approve car loan requests.

1.2 Use cases

The key use cases include:

- Automate the automobile loan pre-approval process by financial institutions.
- Process emails from dealerships, document automation to extract details from applicants W2 statement.
- Provide recommendation & risk score to loan approver powered by GenAI.

2. Requirements & Prerequisites

2.1 System Requirements

Enterprise A360 (Cloud deployed) and Community Edition device requirements.

Review the machine hardware specifications, operating system versions, and browser types supported by Automation Anywhere Enterprise for creating and running bots and command packages as an Enterprise A360 (Cloud deployed) or Community Edition user on your local machine.

2.2 Prerequisites

- Ensure you have access to the packages used in the task bots and API tasks.
- Permission and subscription to call Generative AI actions.

3. Getting Started

3.1 Quick Start

3.1.1 Setup

- No setup required.

3.1.2 Configuration and Use

1. After creating the process automation using the template, make a copy of the dependent automations such as task bots and forms to the folder where the process is created.
2. Remap the automations in each node in the process.
3. Edit and update each task bot according to the applications accessed, Generative AI connection, any other automation asset that you plan to use.

4. Support & FAQs

4.1 Support

Free bots are not officially supported. You can get access to Community Support through the following channels:

- You can get access to Community Support, connecting with other Automation Anywhere customers and developers on [APeople](#) – the [Bot Building Forum](#), the [Bot Store Support Forum](#), or the [Developers Everywhere Group](#).
- Automation Anywhere also provides a [Product Documentation portal](#) which can be accessed for more information about our products and guidance on [Enterprise A2019](#).

4.2 FAQs

For questions relating to Templates refer to [Automation Templates](#)

For questions relating to Enterprise A360: See the [Enterprise A360 FAQs](#)

Appendix A: Record of Changes

No.	Version Number	Date of Change	Author	Notes
1	1.0	17 June 2024	Automation Anywhere	
2	2.0	01 November 2025	Automation Anywhere	<i>Updated package versions, Compatible with Mozart Orchestrator</i>

Appendix B: References

No.	Topic	Reference Link
1	Overview of Enterprise A360	Click here
2	Guidance: Building basic A360 bots	Click here
3	Guidance: Building A360 action packages	Click here
4	APeople Community Forum	Click here
5	Automation Anywhere University	Click here