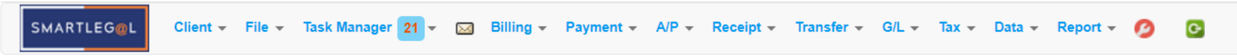
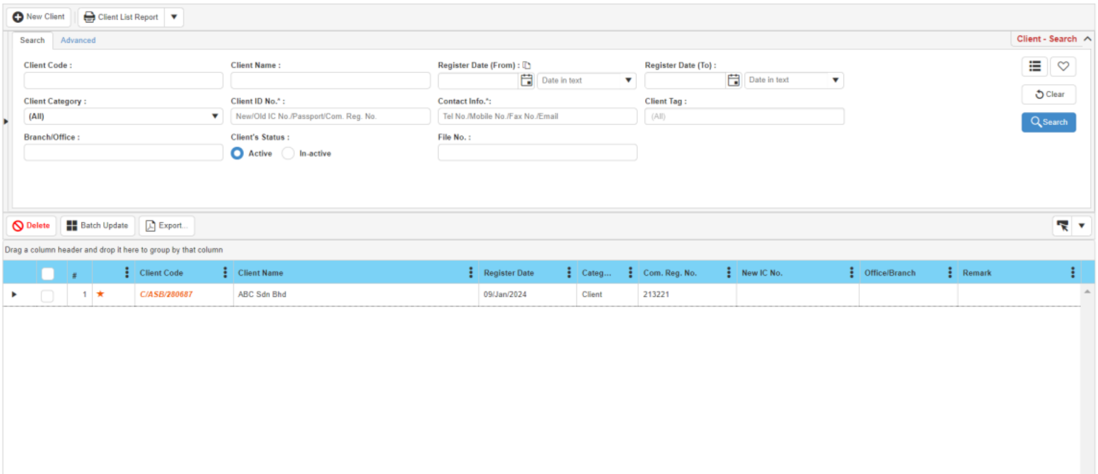
Creating File with Developer’s, Purchaser’s and Bank’s Details

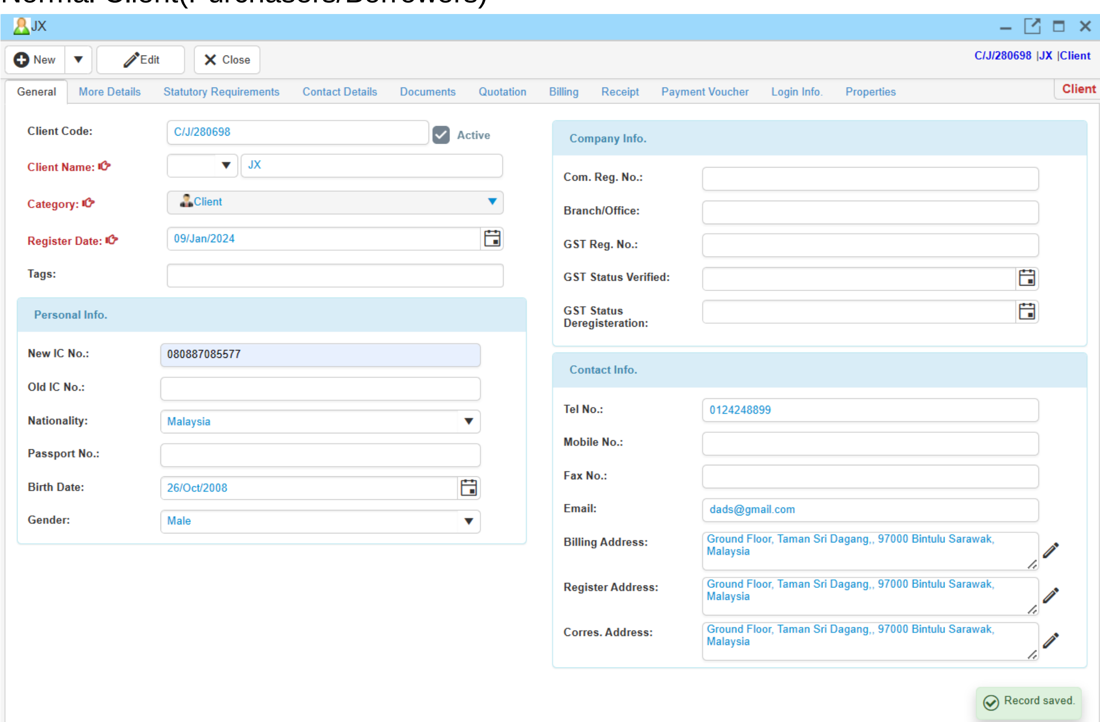


- Click on the “Client” from the navigation bar on top.
- Then, select the second option which is Manage Client



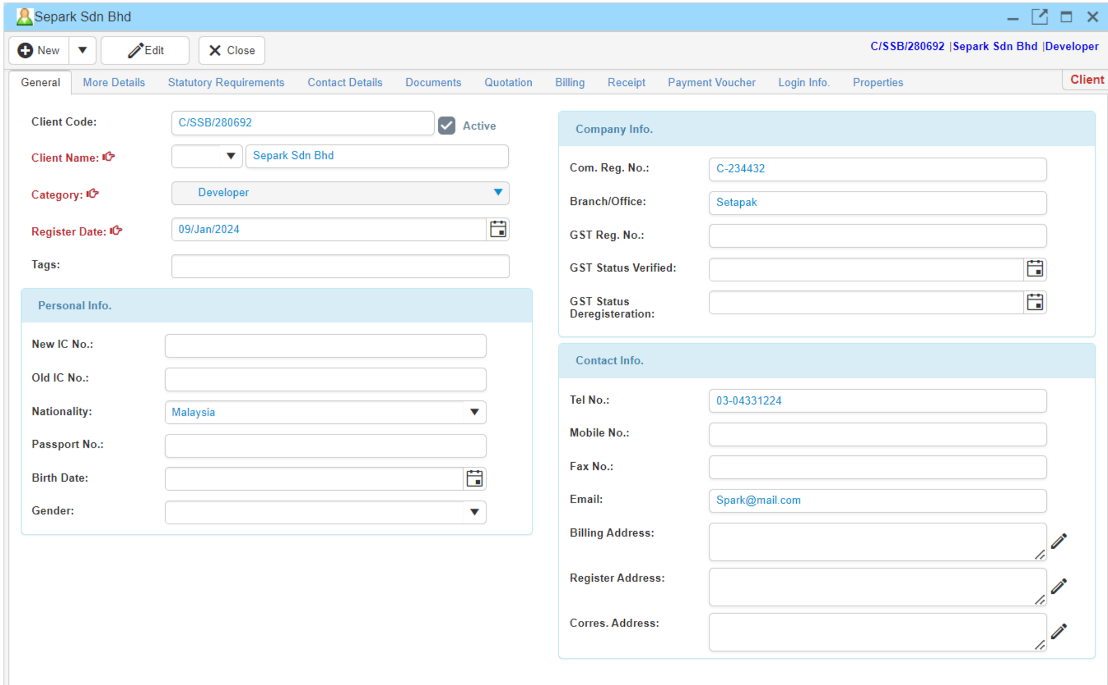
- To add a client(no matter in what category), you should click on the “+New Client” button on the top left corner.

Normal Client(Purchasers/Borrowers)



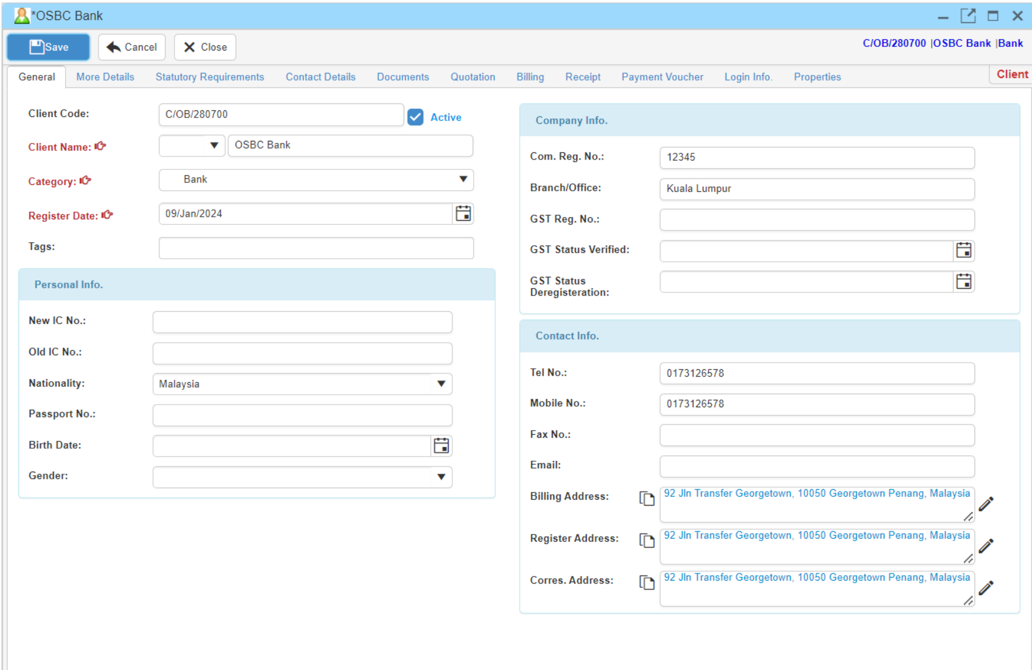
- Fill in all the available information.
- Most importantly, you should make sure that the Category stays as Client.

Developer

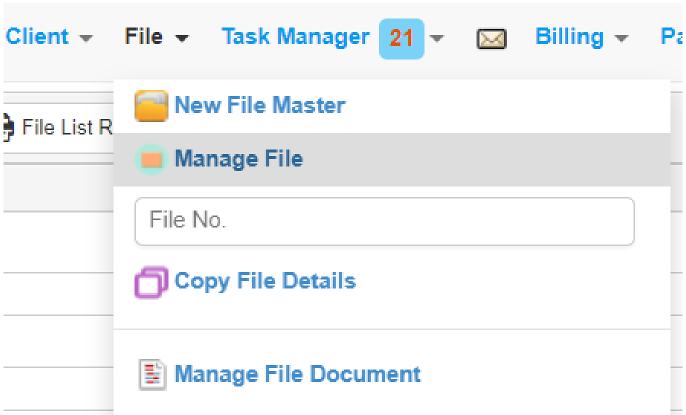


- Select Developer from the Category drop-down list
- Then you should fill in the developer’s name and all the available informations

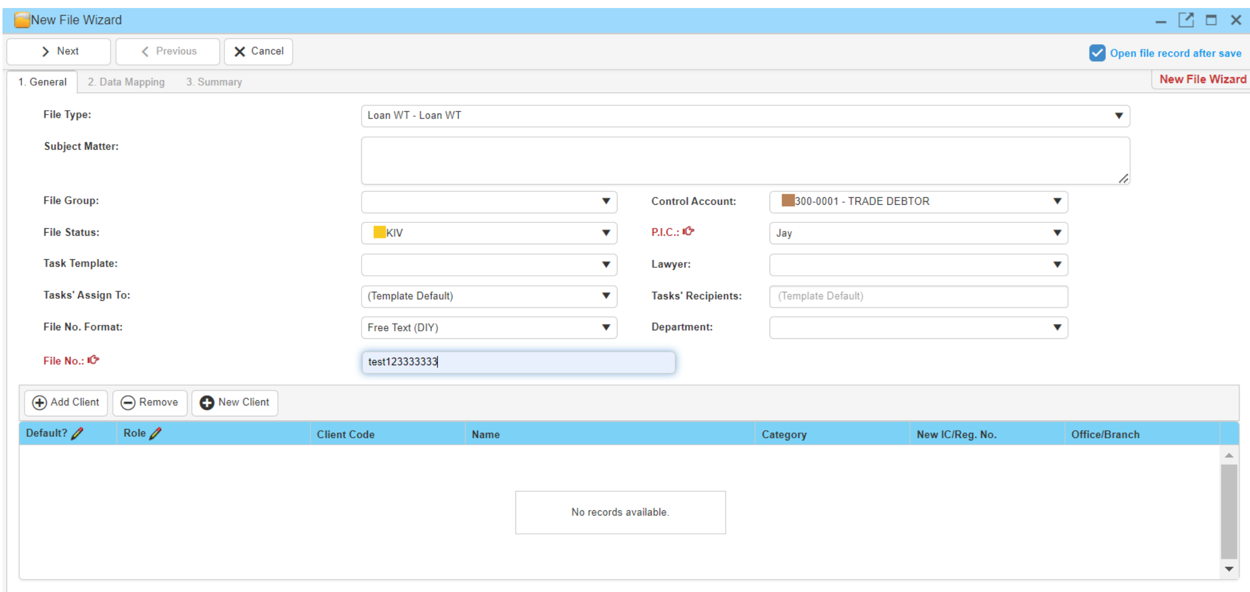
Bank



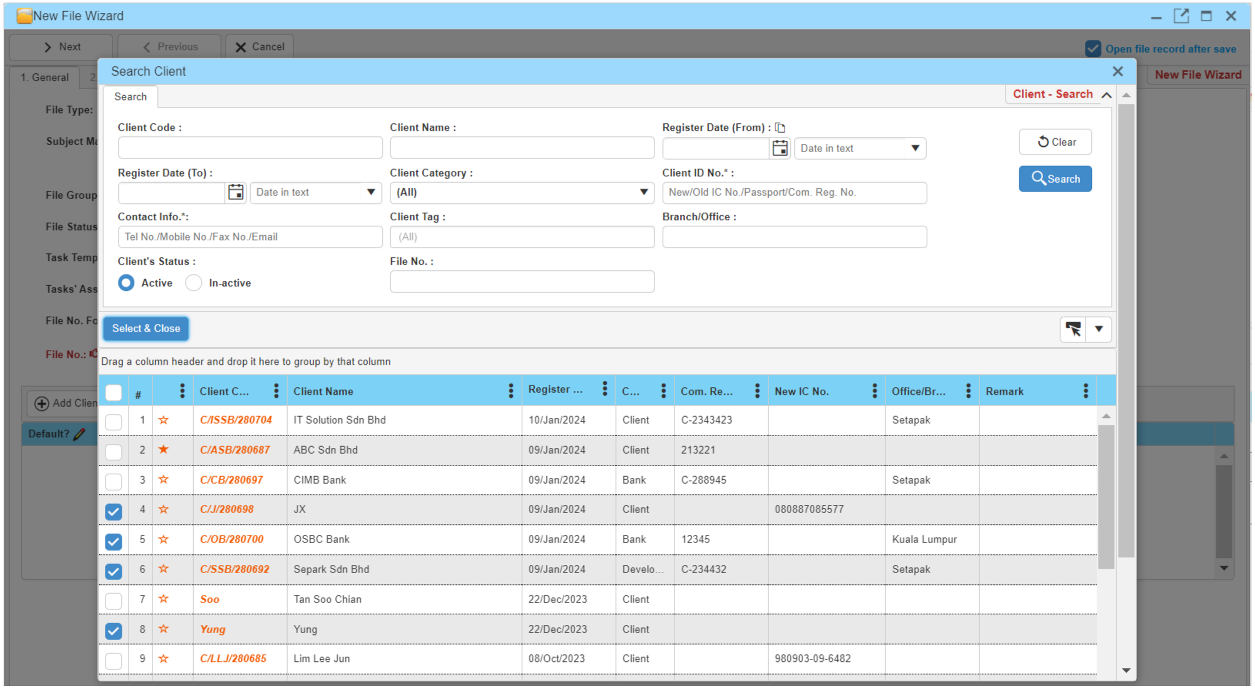
- Select the category from client to bank.
- To add a new bank, you must fill in the bank’s branch else you will not be able to proceed to create a new one.



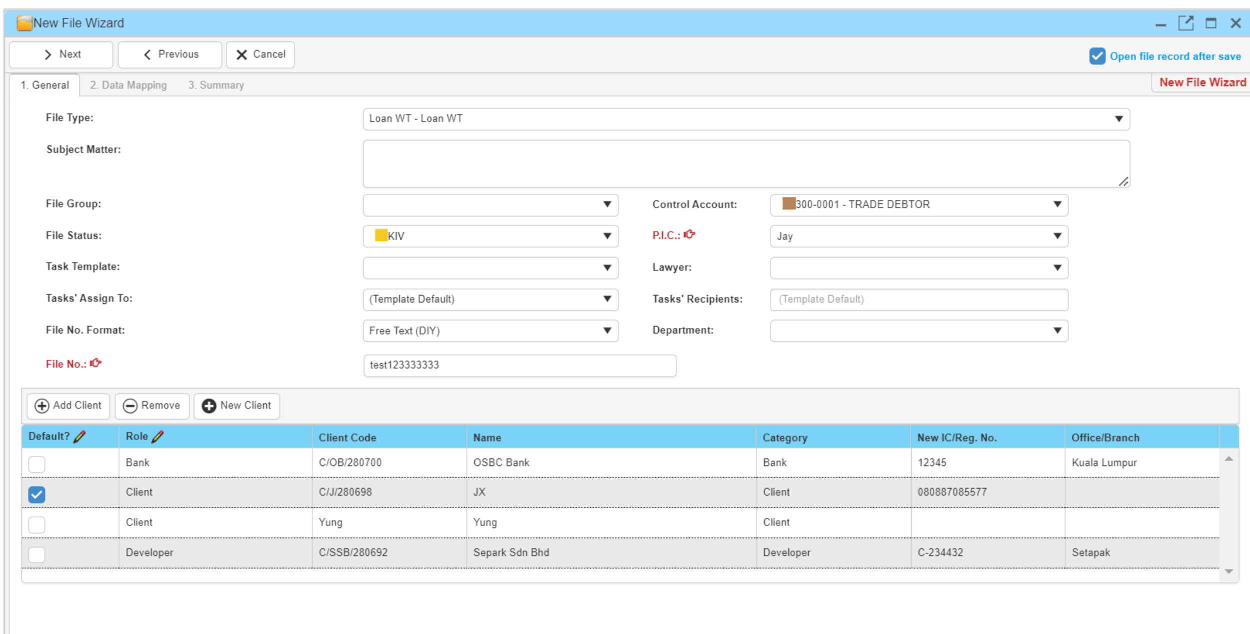
- Then, select “File” from the navigation menu and choose “Manage File”.
- Choose  after you have reached the “Manage File” page.



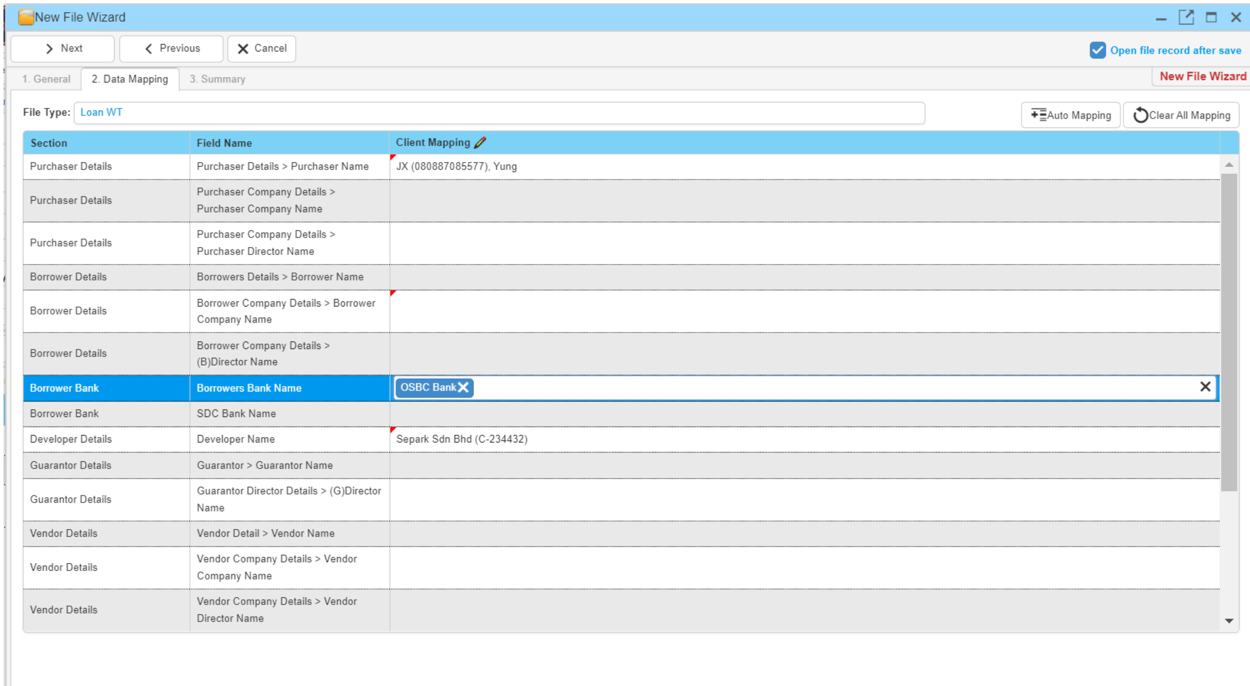
- You must fill in the P.I.C and File No.
- Then, you should proceed with adding clients by clicking on the “+Add Client” button.



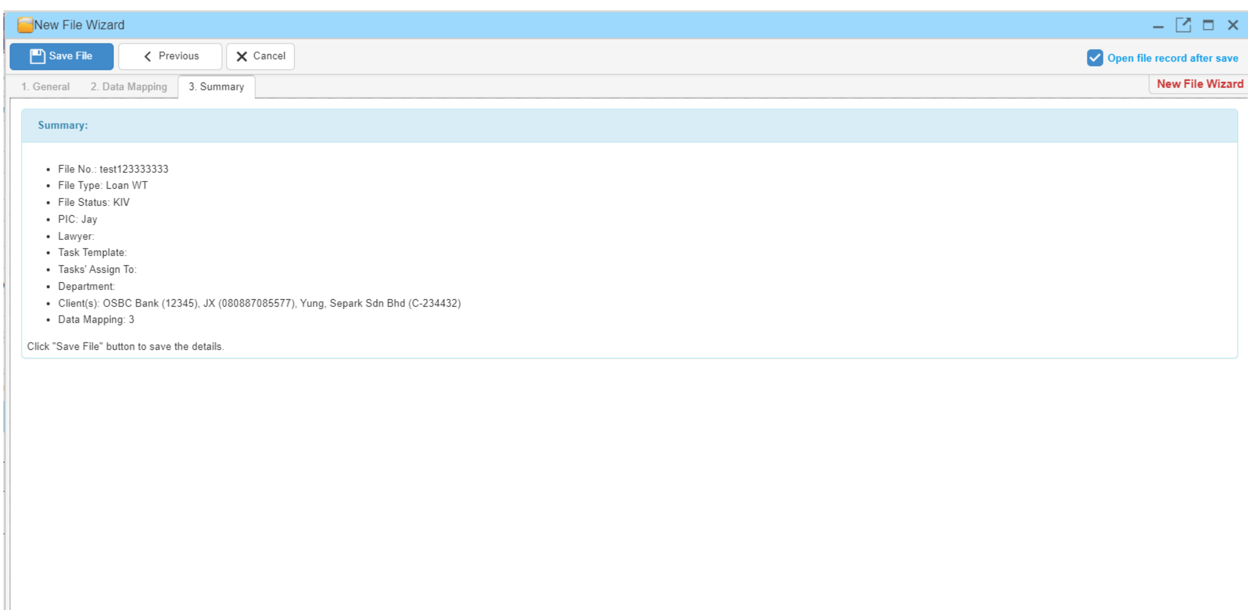
- Find and choose the client that you want to add. You are allowed to choose multiple clients.
- After making decision, you should press the “Select & Close” button.



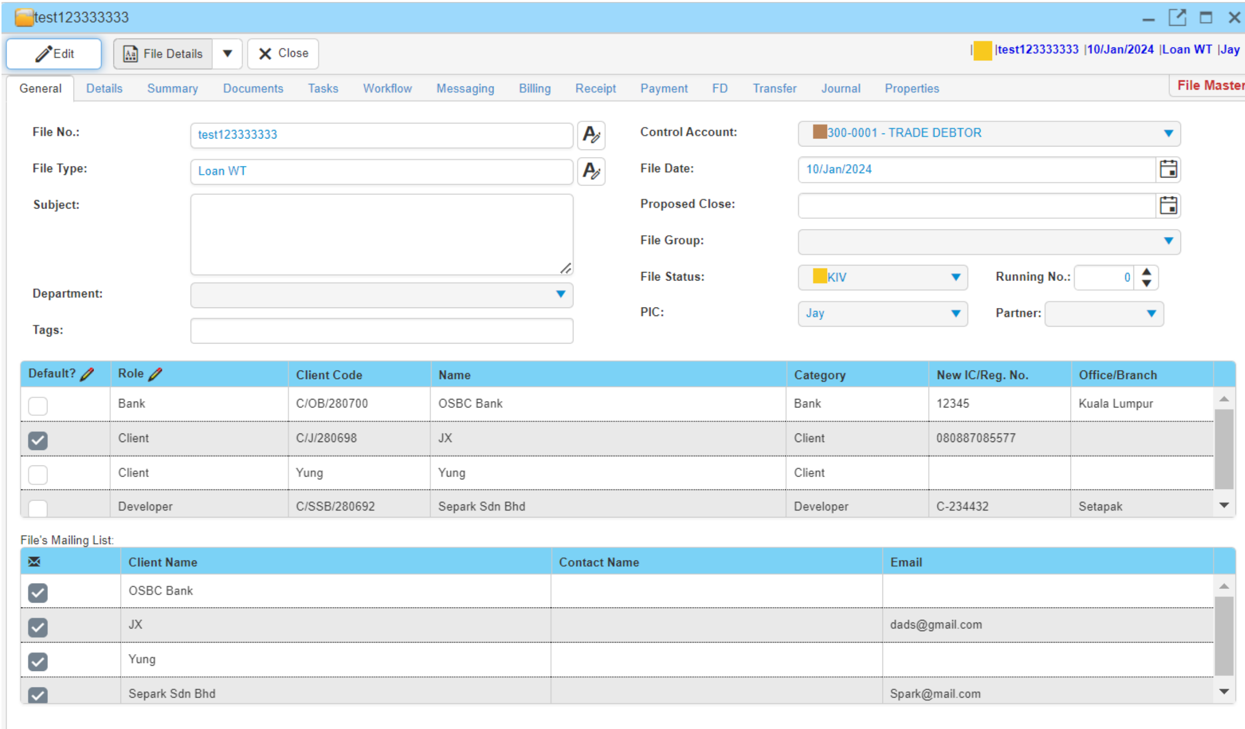
- By default, you should always tick one of them(could be multiple) as a representative.
- Click on the “> Next” button.



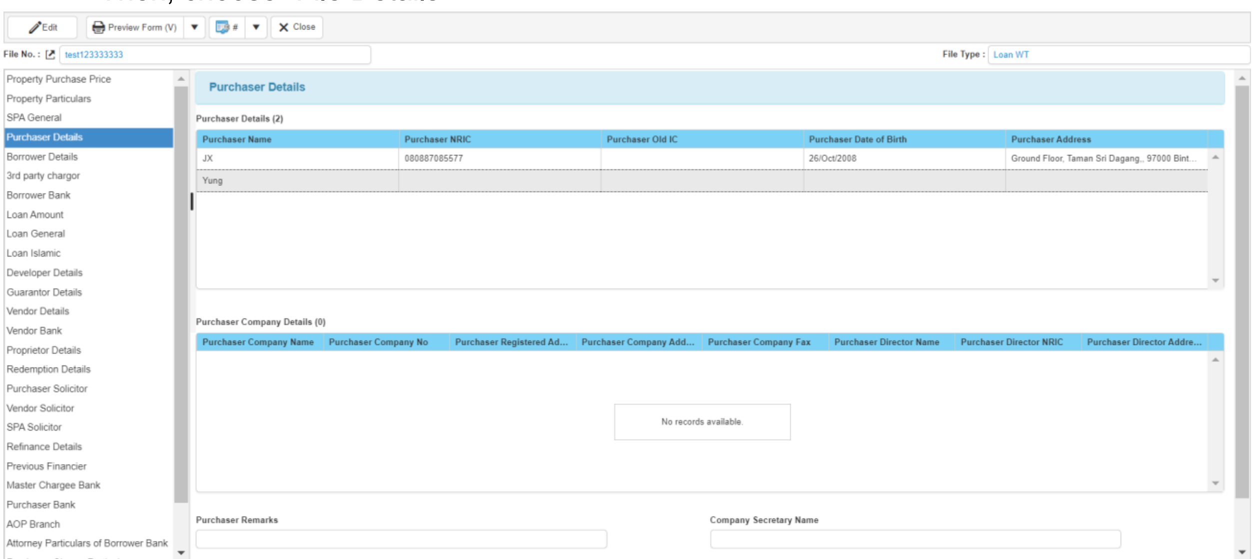
- Click on the empty space to choose the clients from the drop-down list accordingly.
- For Purchase Details and Borrower Details, the first selected purchaser/borrower is served as the primary purchaser/borrower, second selected purchaser/borrower is served as the secondary purchaser/borrower and so forth.
- After filling in all details, click on ">Next" to proceed.

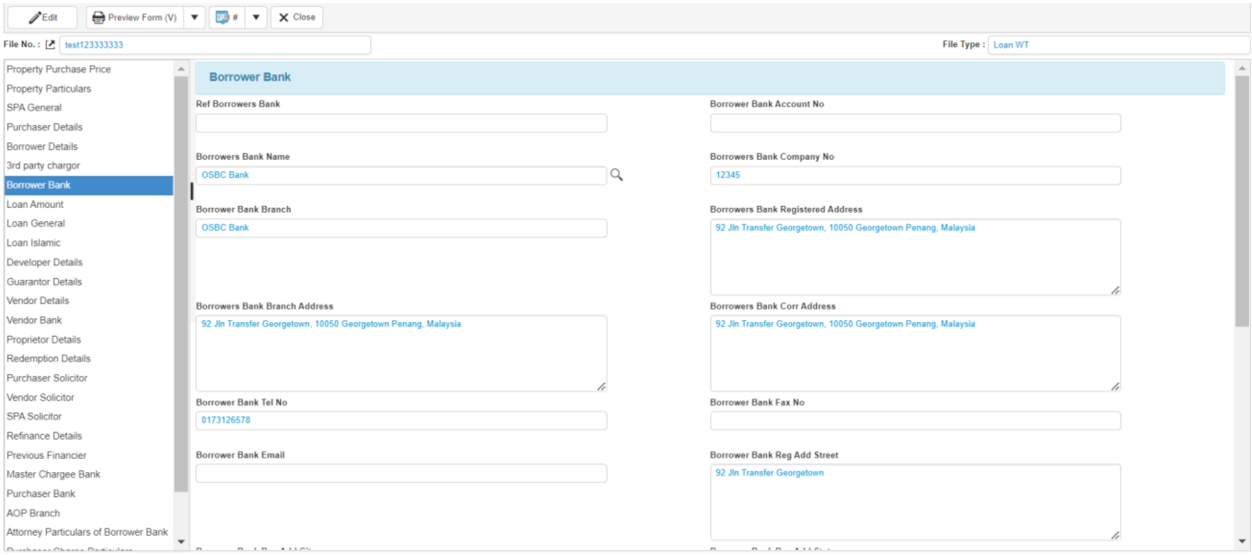


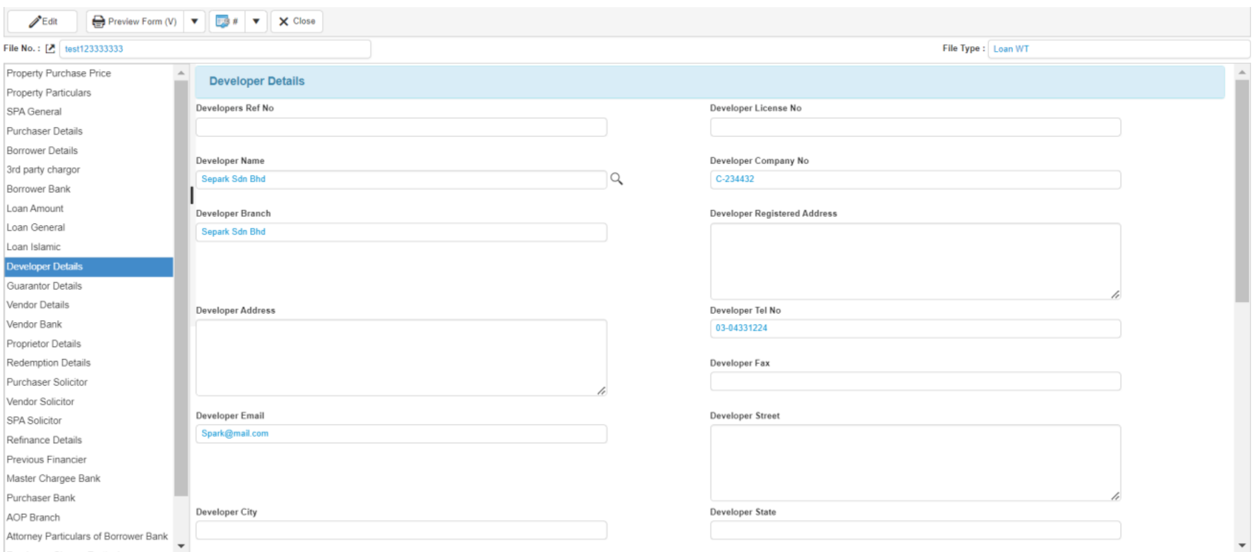
- Then, you may see this page.
- Select "Save file" if you have done checking.



- Then, choose “File Details”.

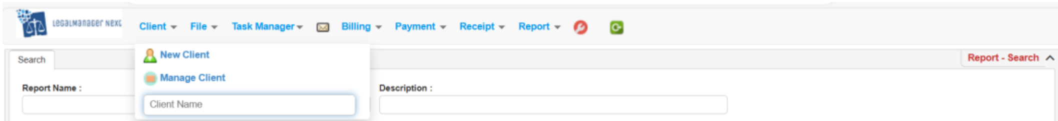




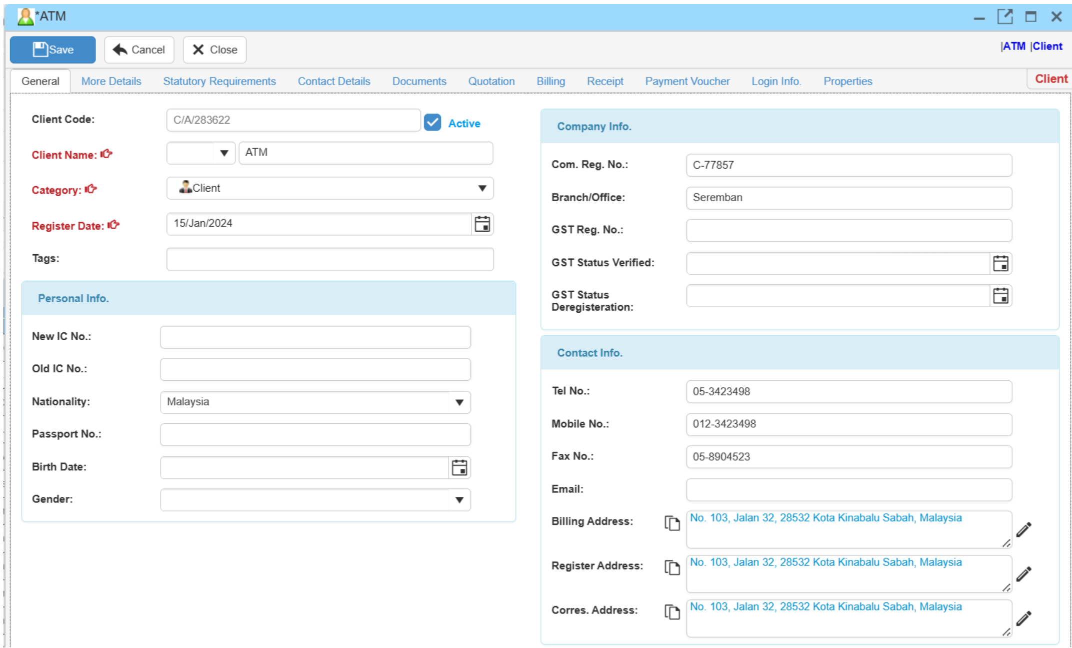


- You may see all the purchaser, borrower, developer etc chosen just now are automatically filled up here.

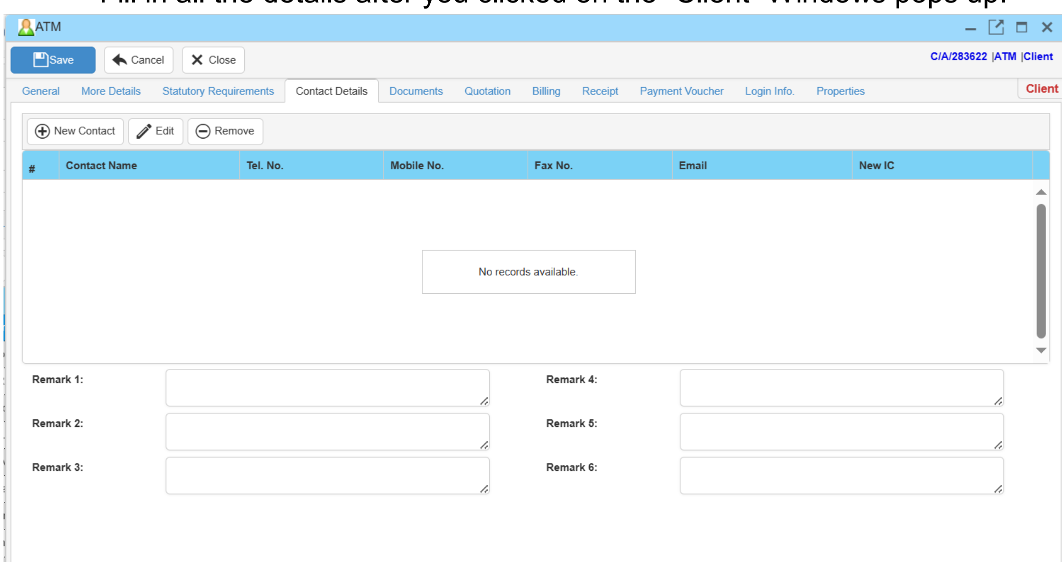
How to Create File with Purchaser's Company

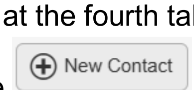


- Click on the “Client” from the navigation bar.

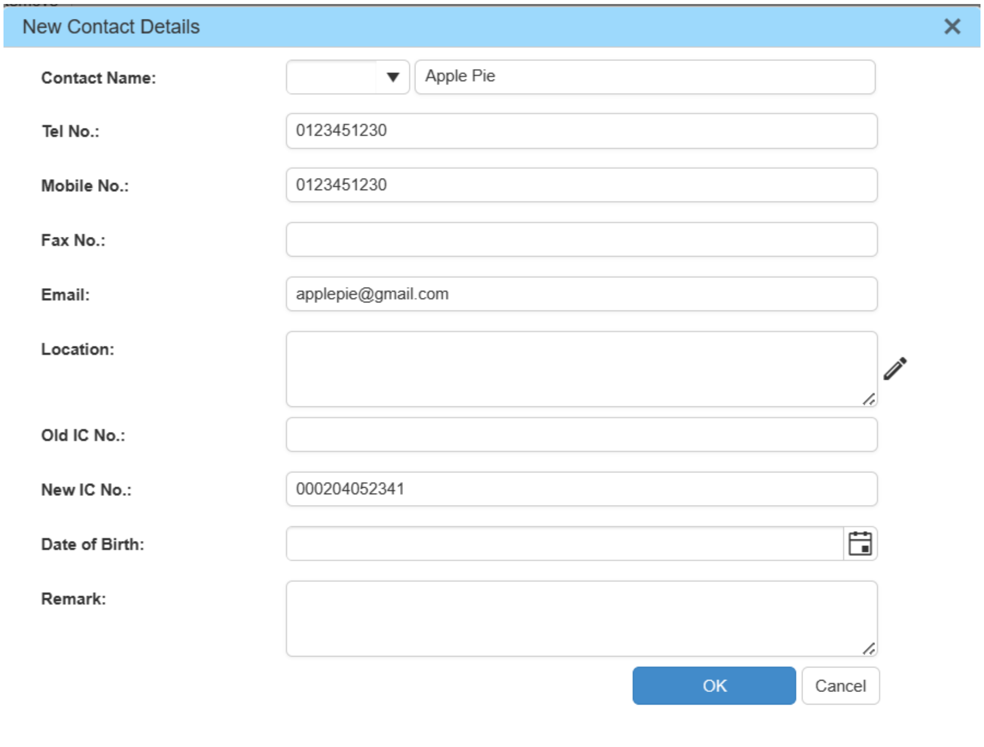


- Fill in all the details after you clicked on the “Client” Windows pops up.

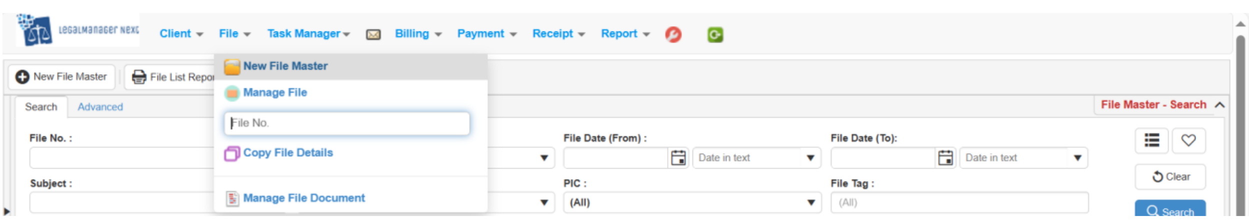


- Then, select “Contact Details” which places at the fourth tab on the navigation bar.
- Add new Director’s details by clicking on the 

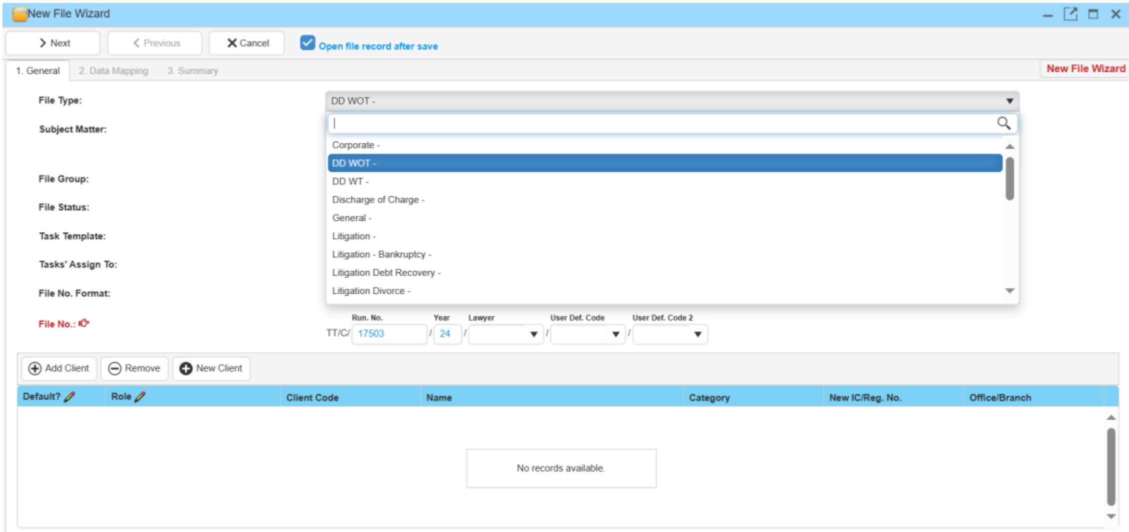
 button.



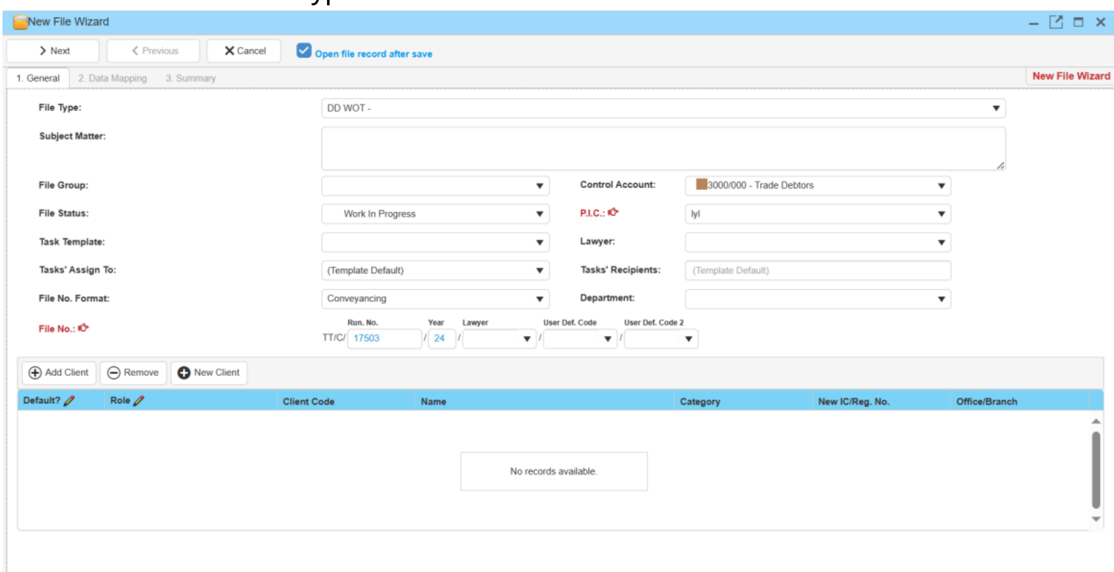
- Fill in all the details as much as possible.
- If you wish to add more Directors, you may repeat the above steps.
- Eventually, click “Save” on the top left corner.



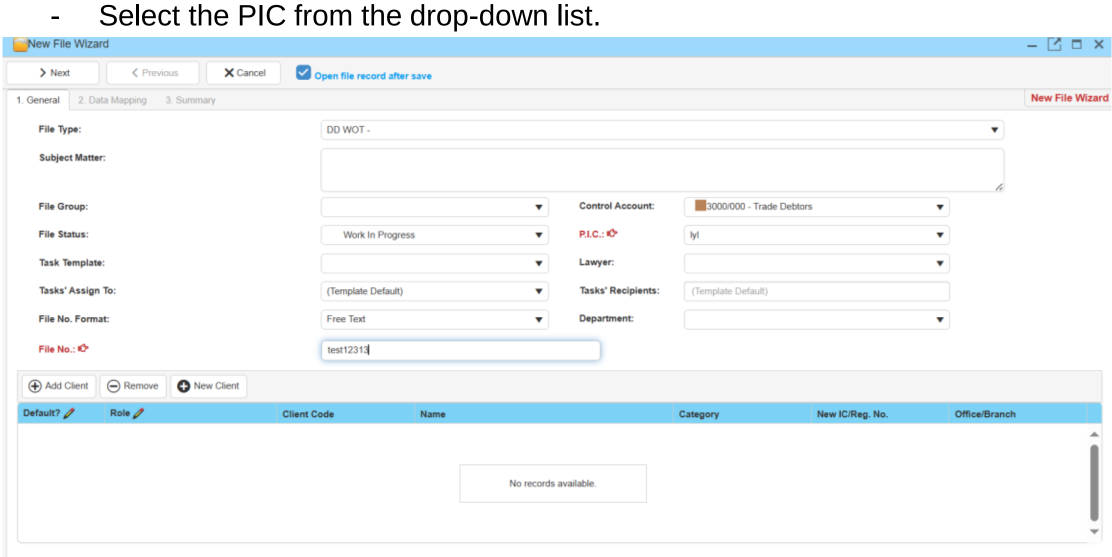
- After saving all the details, click on the “File” tab and select “New File Master”.



- Select the File Type.

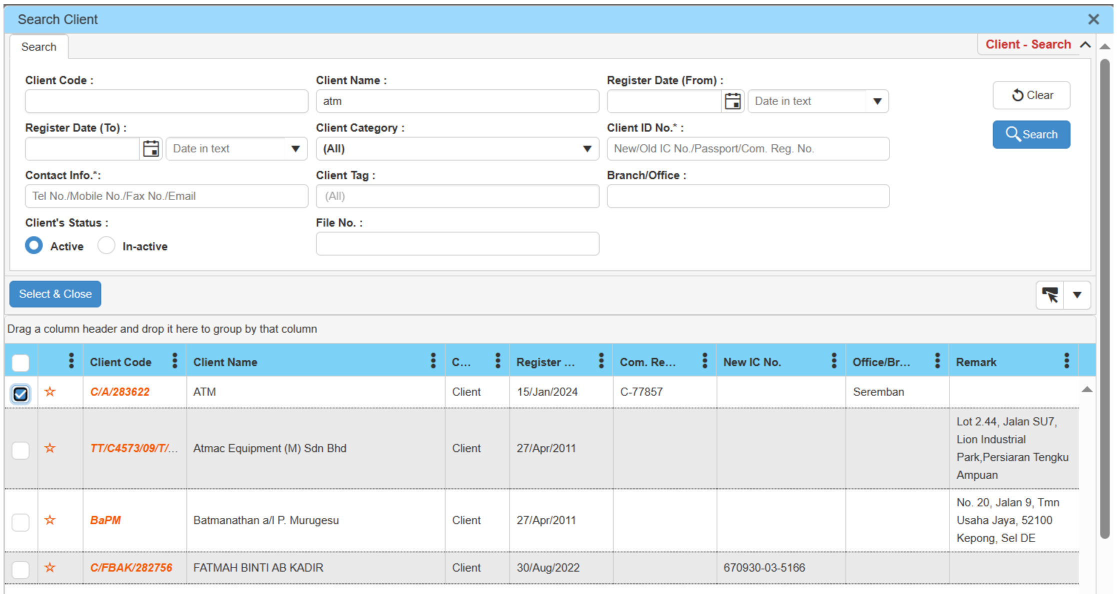


- Select the PIC from the drop-down list.



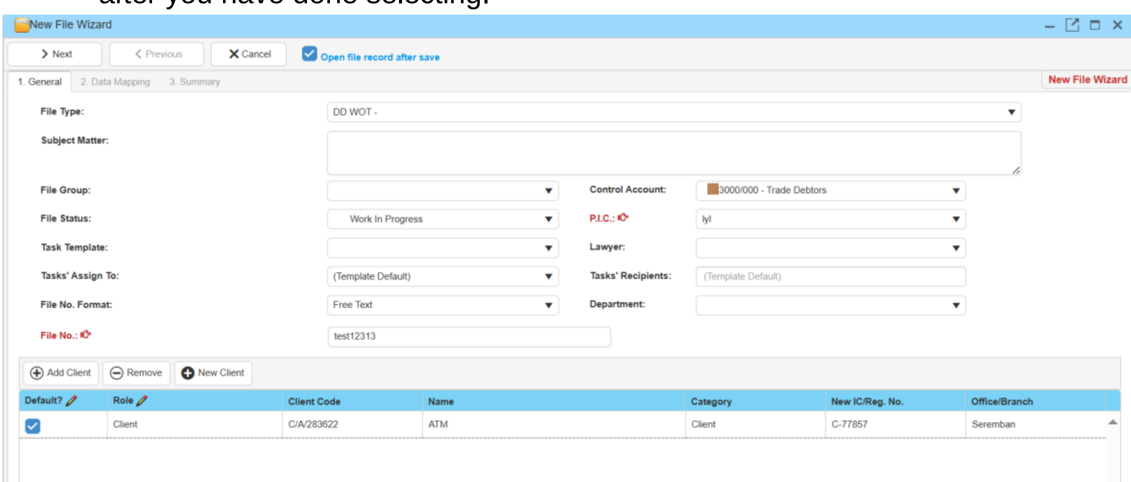
- Select File No Format and key in the File No.
- Click on the 

button

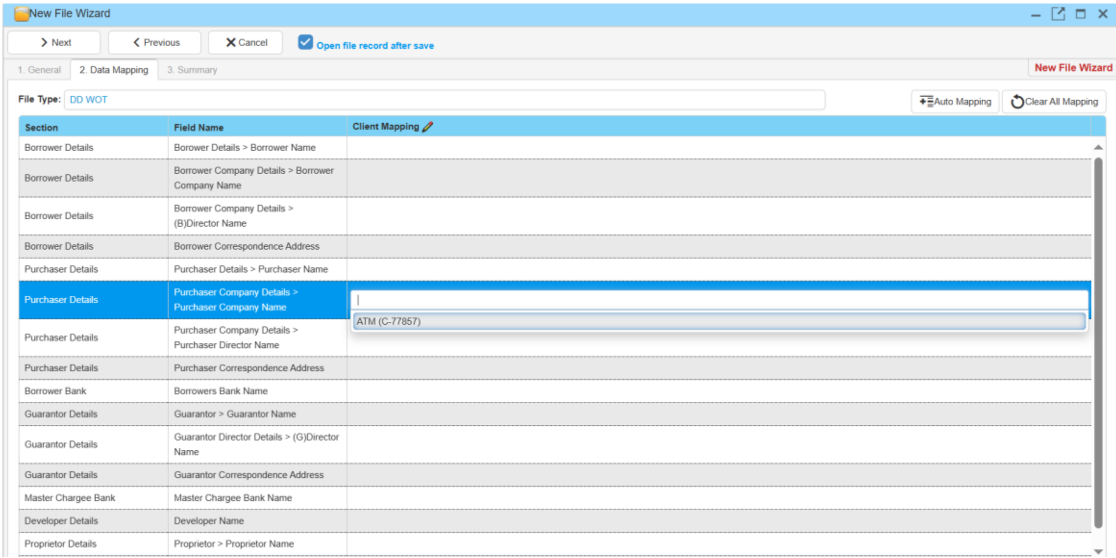


- Search the client by either typing in the Client Code or Client Name.
- Then, tick on the particular client that you wish to add in. Click on 

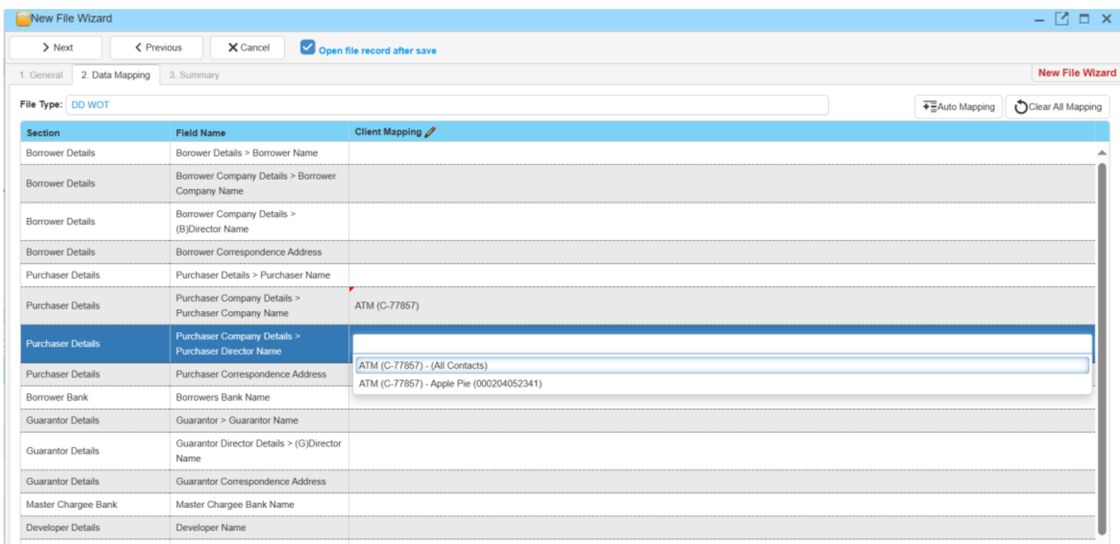
button after you have done selecting.



- The output will be like the above figure. Click on the “>Next” button.



- Click on the Purchase Details which has the field of Purchaser Company Name.
- Select the Company Name.



- Then, click on the Purchaser Details' row which has the Purchaser Director Name as field name.
- Select the Company Director Name.
- Finally, click on the "> Next" button and "Save File" button.