



Head office User manual – Limit and Guarantee Report View

Guarantee Management System

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Introduction

This user manual is designed to help you quickly get acquainted with basic tasks of Guarantee Management System's head office user.

Audience

This manual is intended for the following User Roles:

Role	Function
Head Office User	Guarantee report, commission amount report and limit report view

User

- After you have successfully logged into Guarantee Management System as a head office user, the screen on (Figure 1) will be displayed.
- D1 shows logged in user role.
- D2 shows logged in user branch.
- D3 shows logged in user name.
- Click on the drop down arrow next to user name (B1) (Figure 1) which will drop a modal as shown in Figure 2.
- Click on “need help?” button (B1) (Figure 2) to get this user manual.
- Click on “sign out” button (B2) (Figure 2) to log out of this system.

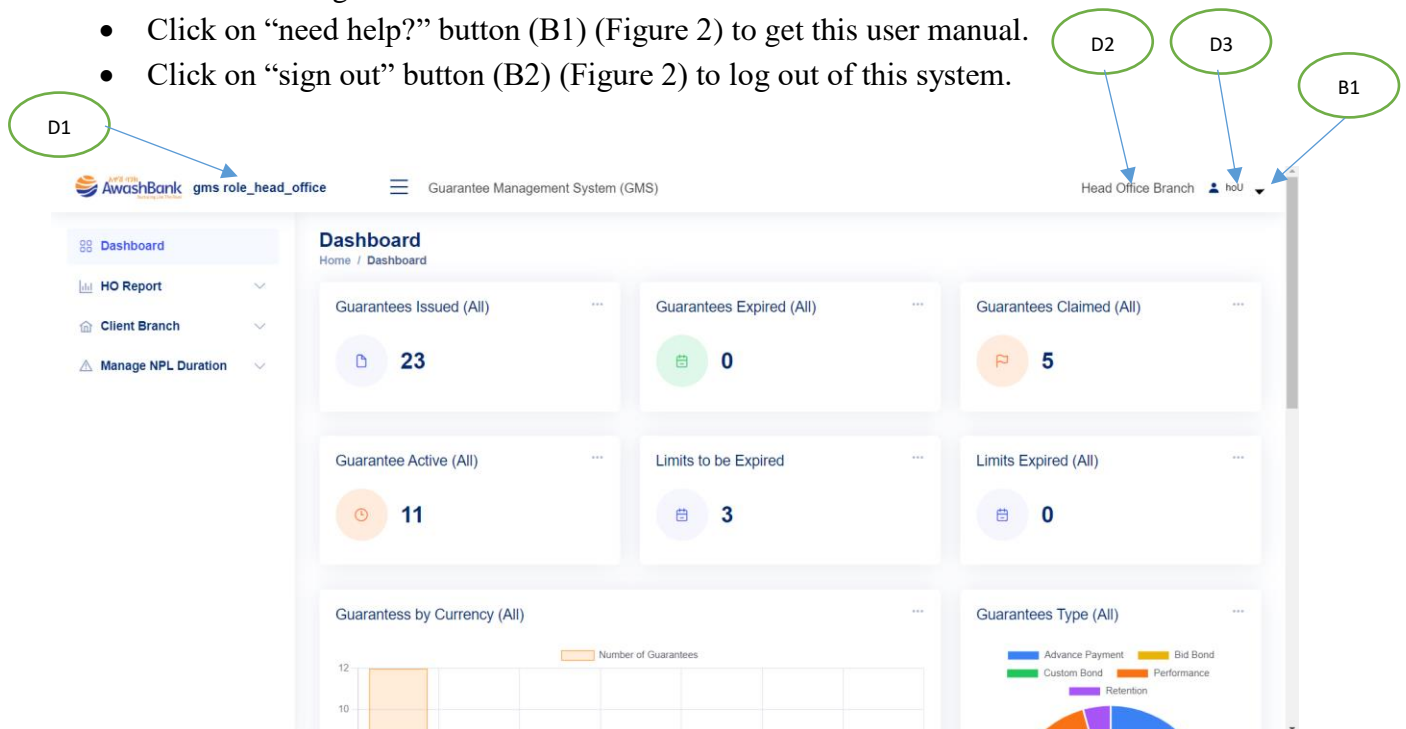


Figure 1: page after log in

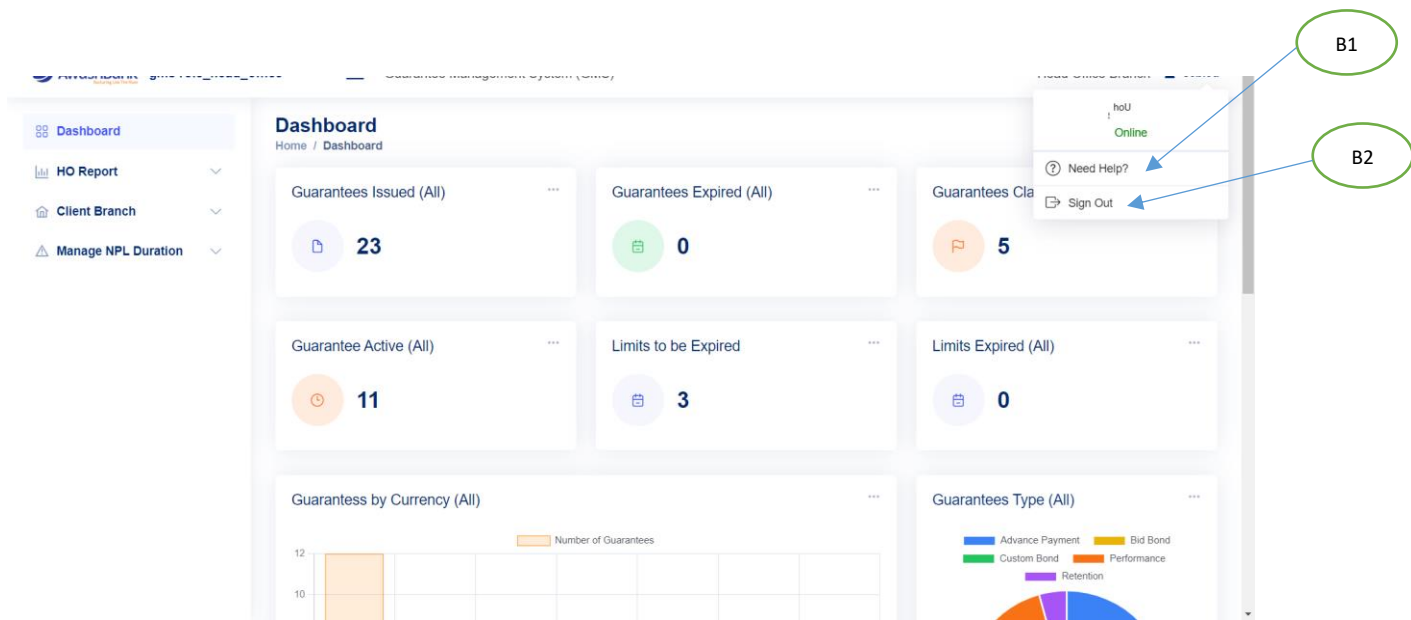


Figure 2: user actions

Dashboard

There are different charts on the dashboard page as shown in Figure 3. Scroll down to see other dashboard charts as shown in Figure 4 and Figure 5.

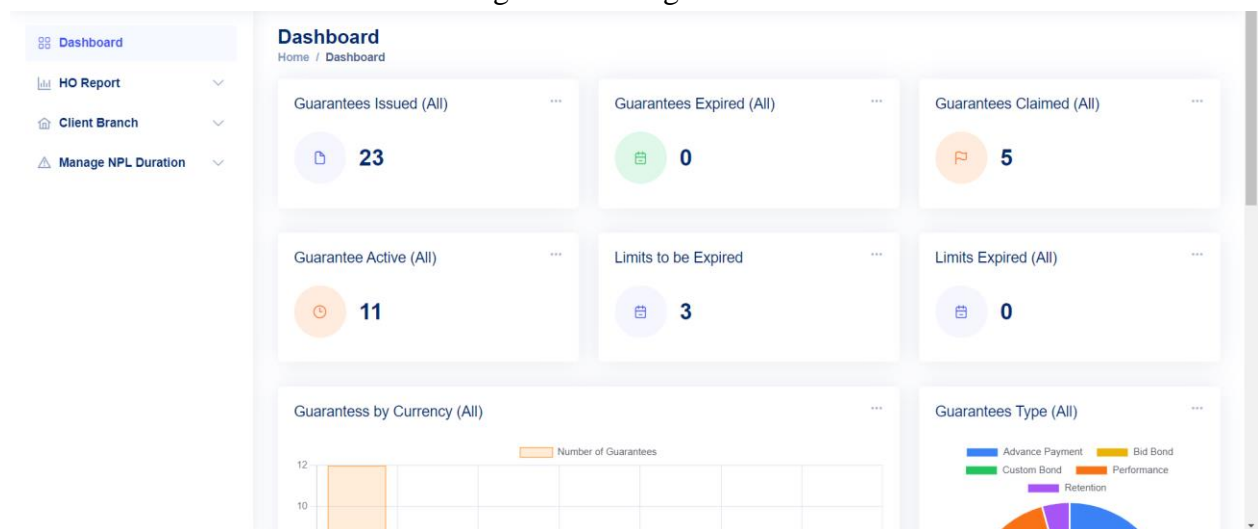


Figure 3: dashboard



Figure 4: dashboard cont. 2



Figure 5: dashboard cont. 3

Report

Bank wide report:

- To view ho report, click on “bank wide report” sub-menu (M1) as shown in Figure 6.
- After that you will be redirected to a page as shown in Figure 7.
- You can load all report by clicking on the button “load all report” (B1) or apply filter by selecting from filter options then click on the button “apply filter” (B2) as shown in Figure 7.
- Selected filters will be displayed as shown in Figure 8(D1).
- To export report to excel, click on (B1) and to export to pdf, click on (B2) as shown in Figure 9.

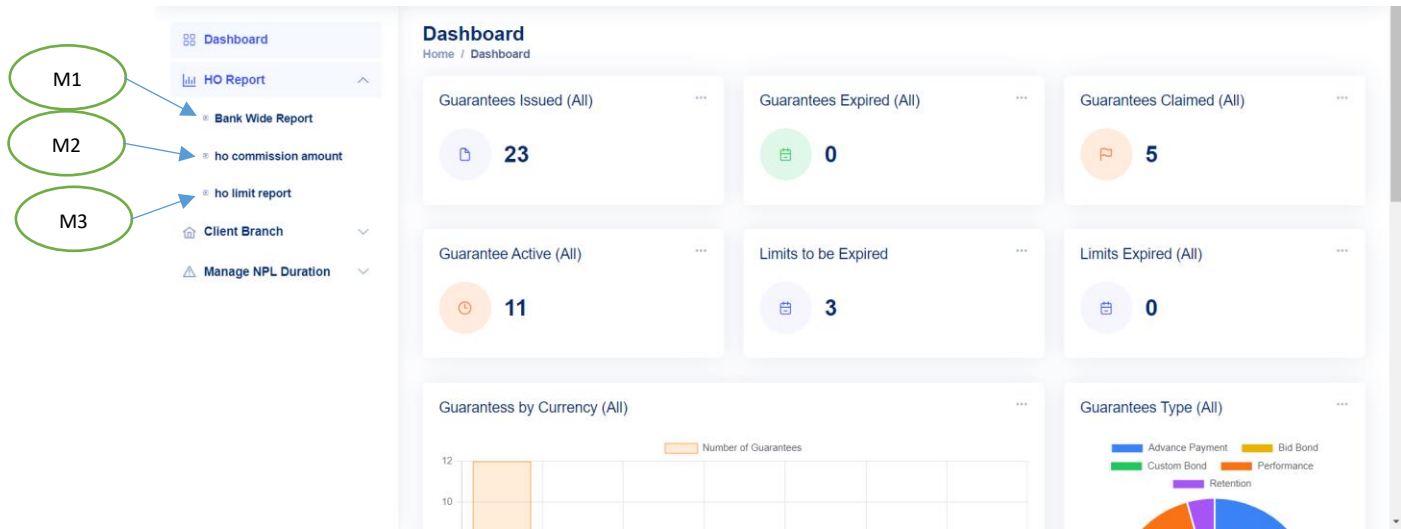


Figure 6: report sub-menu

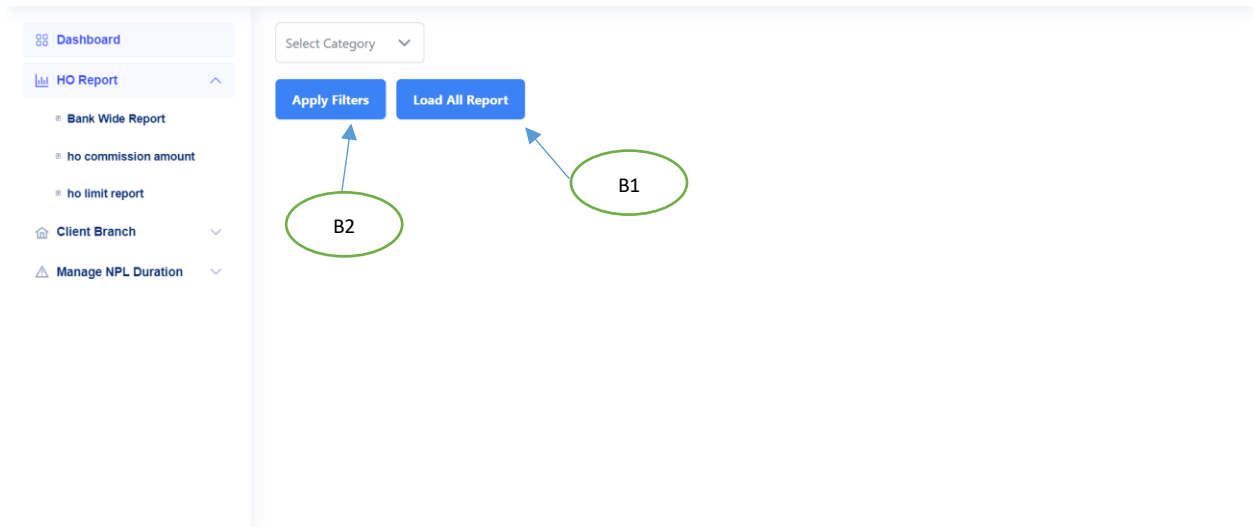


Figure 7: bank wide report

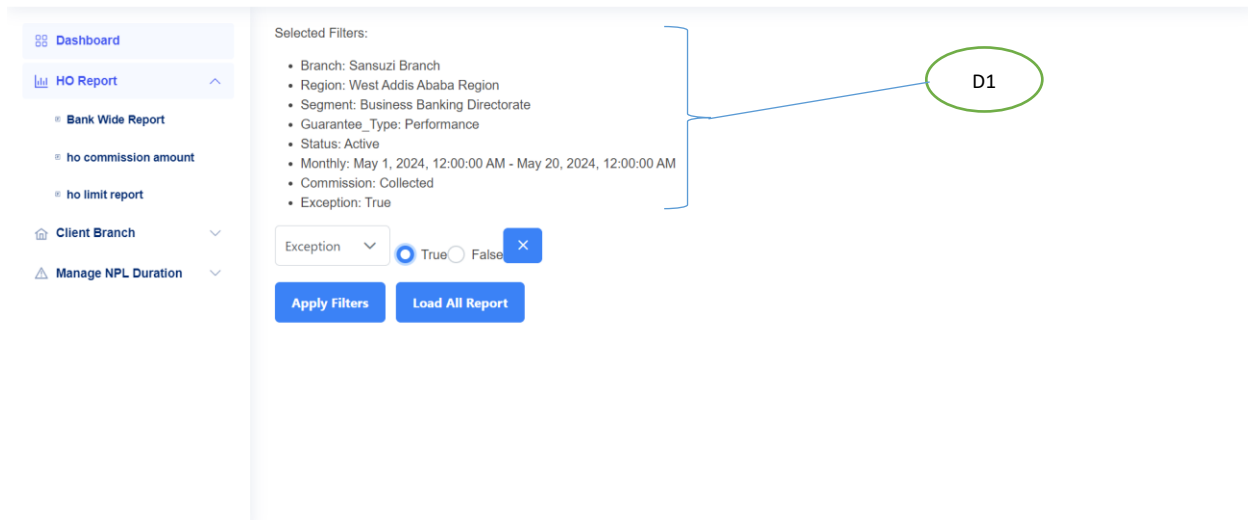


Figure 8: selected filters for bank wide report

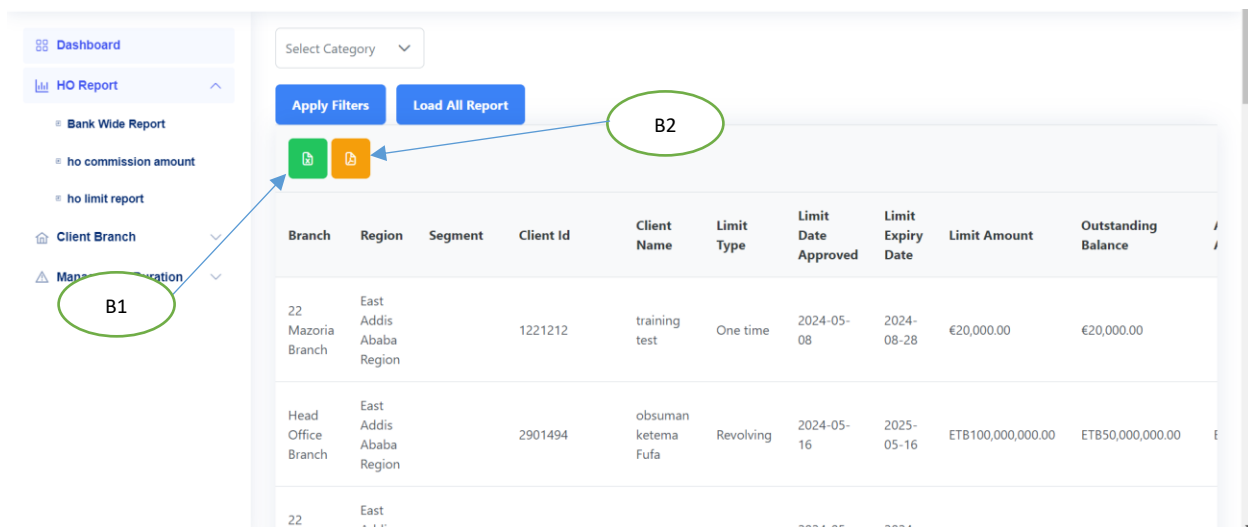


Figure 9: export bank wide report

Commission Amount Report:

- To view commission amount report, click on “ho commission amount” sub-menu (M2) as shown in Figure 6.
- After that you will be redirected to a page as shown in Figure 10.
- Click on “Load report” button (B1) as shown in Figure 10.
- You can select date range (B2) filter method which is optional as shown in Figure 10.
- To export the loaded report to excel, click on B1 (Figure 11).
- To export the loaded report to pdf, click on B2 (Figure 11).

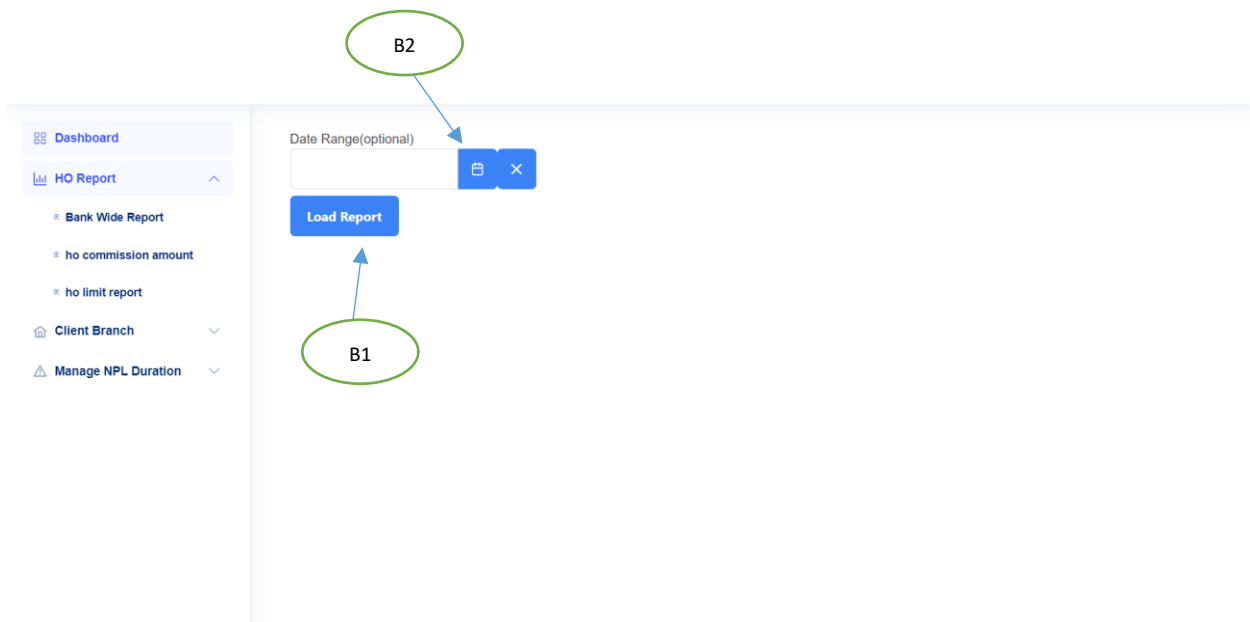


Figure 10: ho commission amount report

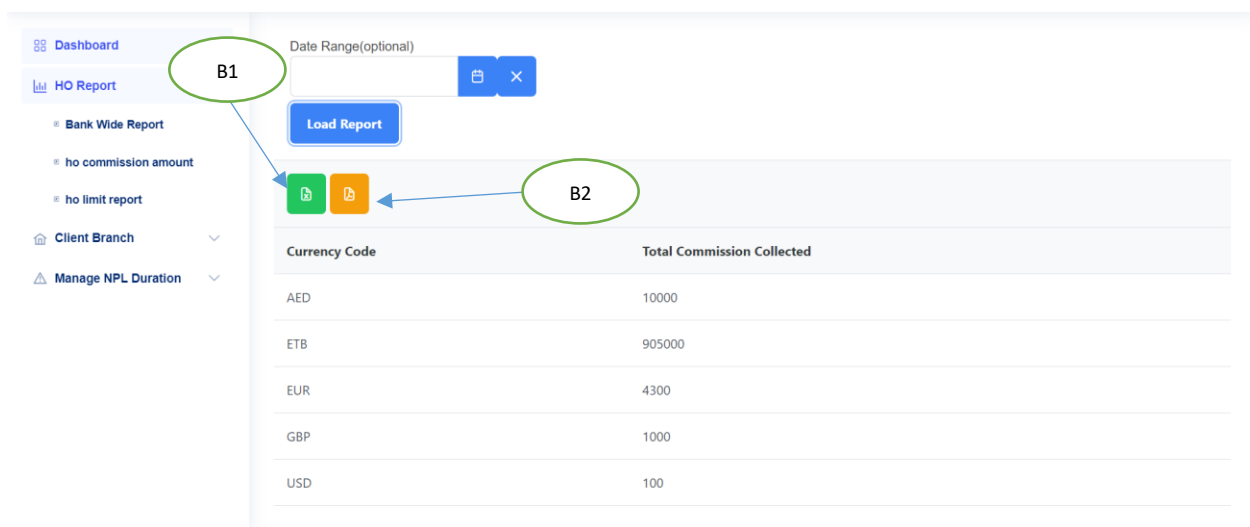


Figure 11: ho commission amount report export

Limit Report:

- To view limit report, click on “ho limit report” sub-menu (M3) as shown in Figure 6.
- After that you will be redirected to a page as shown in Figure 12.
- Click on “Load report” button (B1) as shown in Figure 12.
- You can select limit to expire (B2) or limit expired (B3) filter method which is optional as shown in Figure 12.
- To export the loaded report to excel, click on B1 (Figure 13).
- To export the loaded report to pdf, click on B2 (Figure 13).

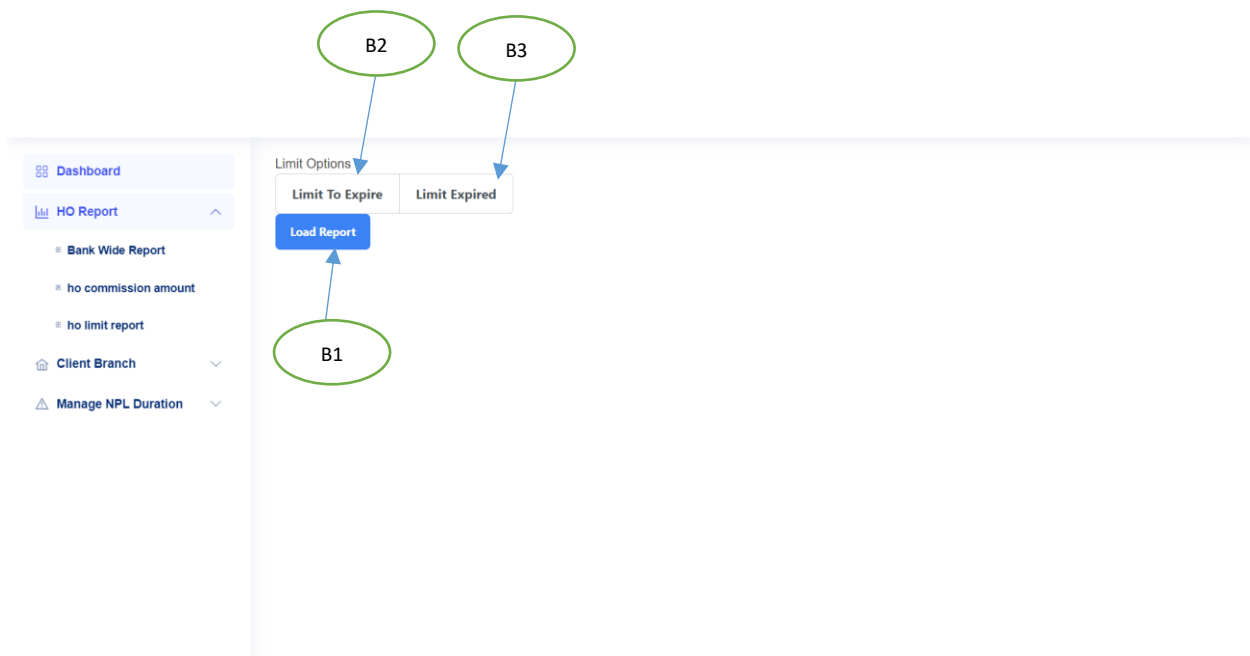


Figure 12: ho limit report

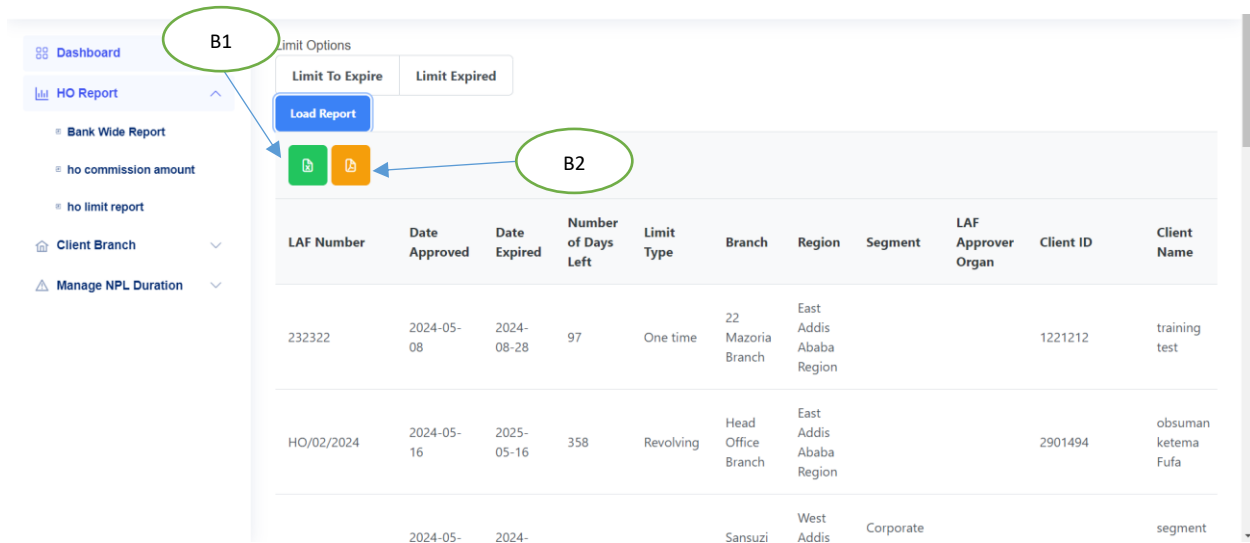


Figure 13: limit report export

Client Branch

Change Client Branch:

- To change client branch, click on “change client Branch” sub-menu (M1) as shown in Figure 14.
- After that you will be redirected to a page as shown in Figure 15.
- You can search by client/customer name (B1) as shown in Figure 16.
- Click on “update” button (B2) as shown in Figure 16 which will pop up a modal as shown in Figure 17.
- You can search the new branch (B1) as shown in Figure 18.
- Click on “submit” button (B1) to submit or “cancel” (B2) to cancel request as shown in Figure 17.
- You will get a message (S1) on successful submission as shown in Figure 19.

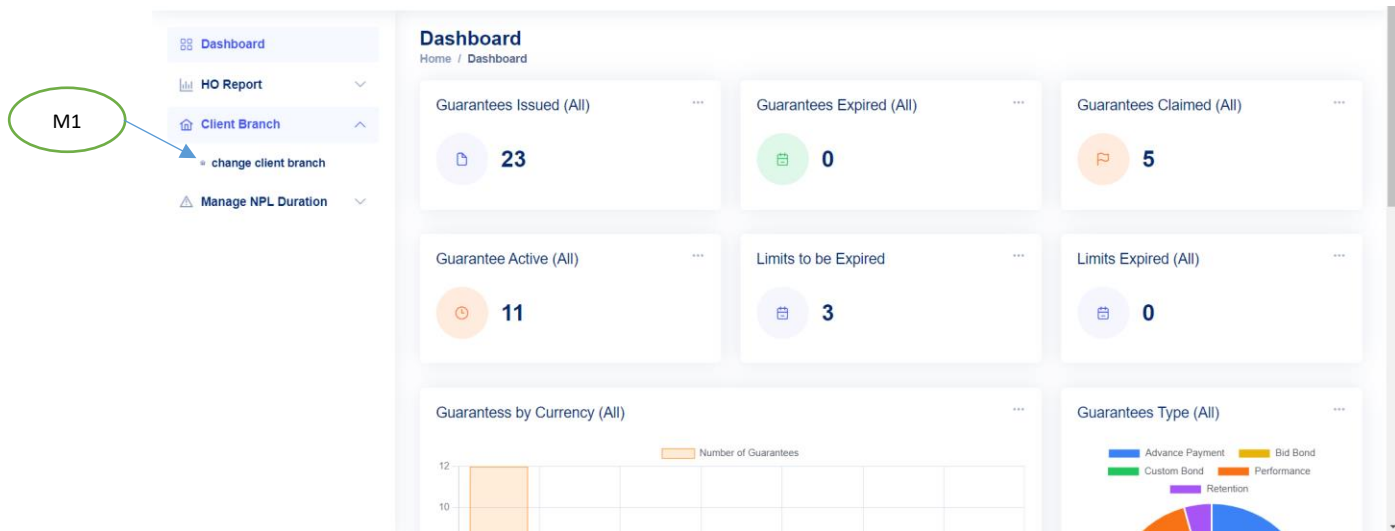


Figure 14: client branch sub-menu

Client Branch Transfer				
Search client/customer				
Client Id	Client Name	Branch	Region	Action
01234	XYZ PLC	Head Office Branch	East Addis Ababa Region	Update
0131111111111	segment customer name	Sansuzi Branch	West Addis Ababa Region	Update
0132026032333	Kisi Boja Boru	22 Mazoria Branch	East Addis Ababa Region	Update
013206032200	Garama Nagaro Gurmu	22 Mazoria Branch	East Addis Ababa Region	Update

Figure 15: client branch transfer

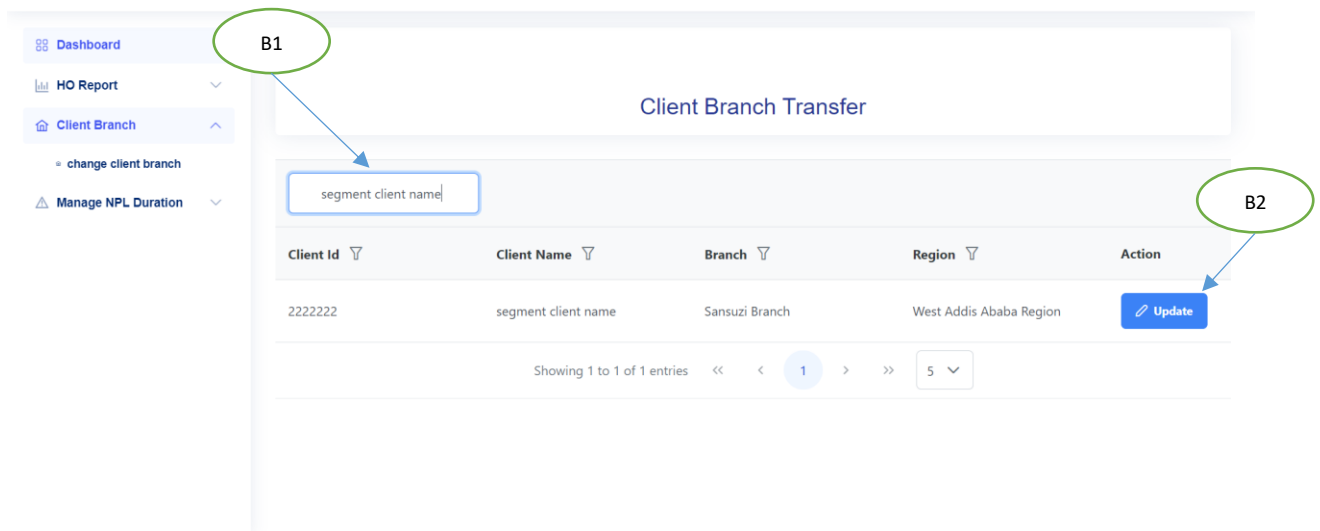


Figure 16: search client name

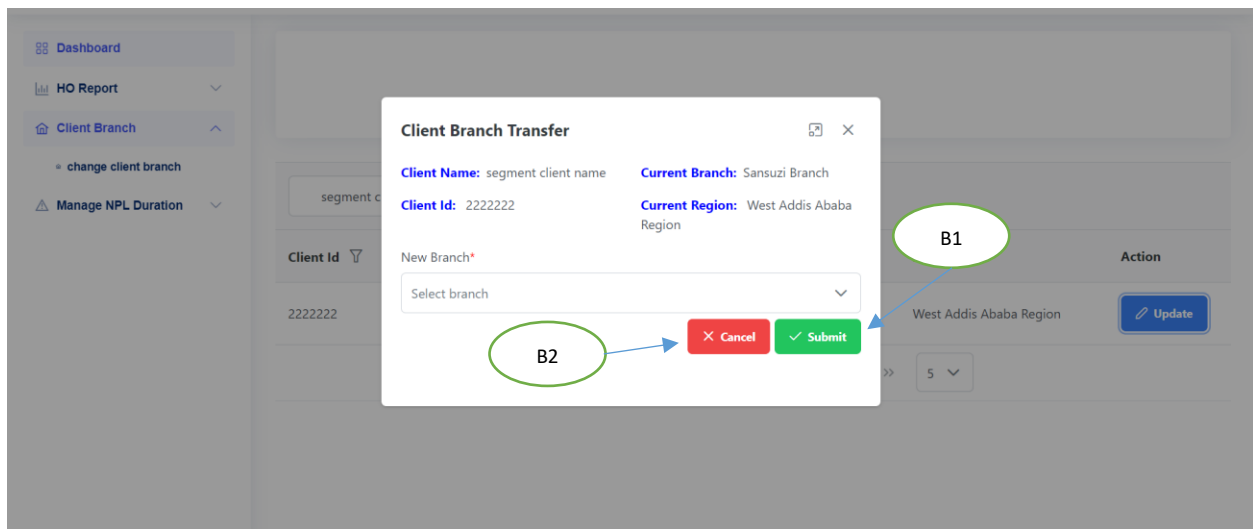


Figure 17: client new branch

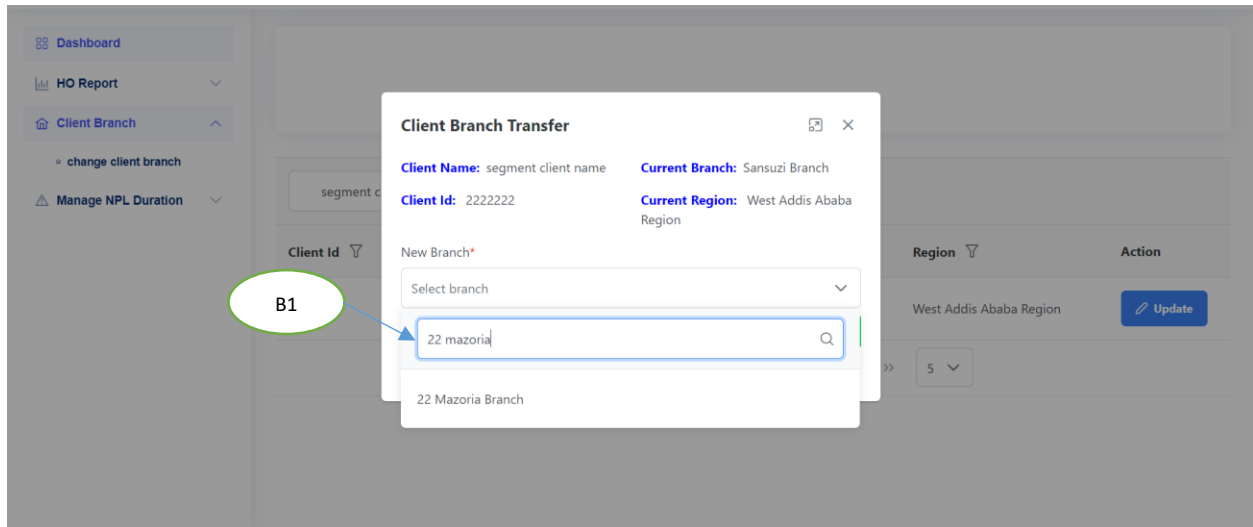


Figure 18: search new branch

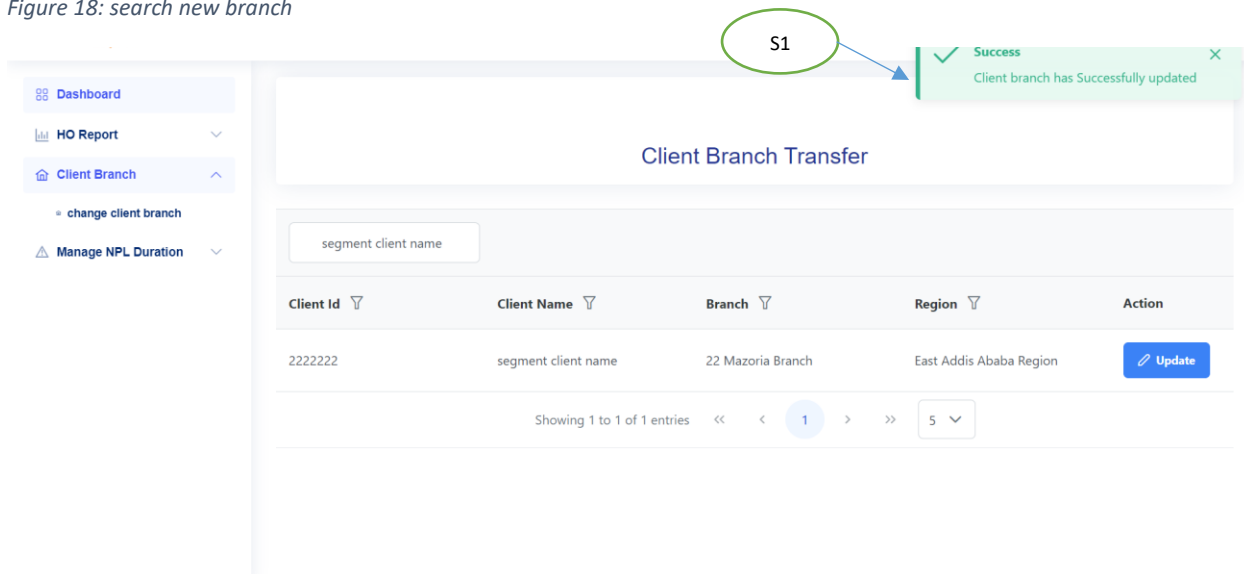


Figure 19: client new branch updated

Manage NPL Duration

NPL Duration:

- To manage NPL duration, click on “NPL duration” sub-menu (M1) as shown in Figure 20.
- After that you will be redirected to a page as shown in Figure 21.
- To update NPL duration, click on “update” button (B1) as shown in Figure 21 which will pop up a modal as shown in Figure 22.
- After changing the duration (D1), click on “update” button (B1) as shown in Figure 22.
- You will get a message (S1) on successful submission as shown in Figure 23.

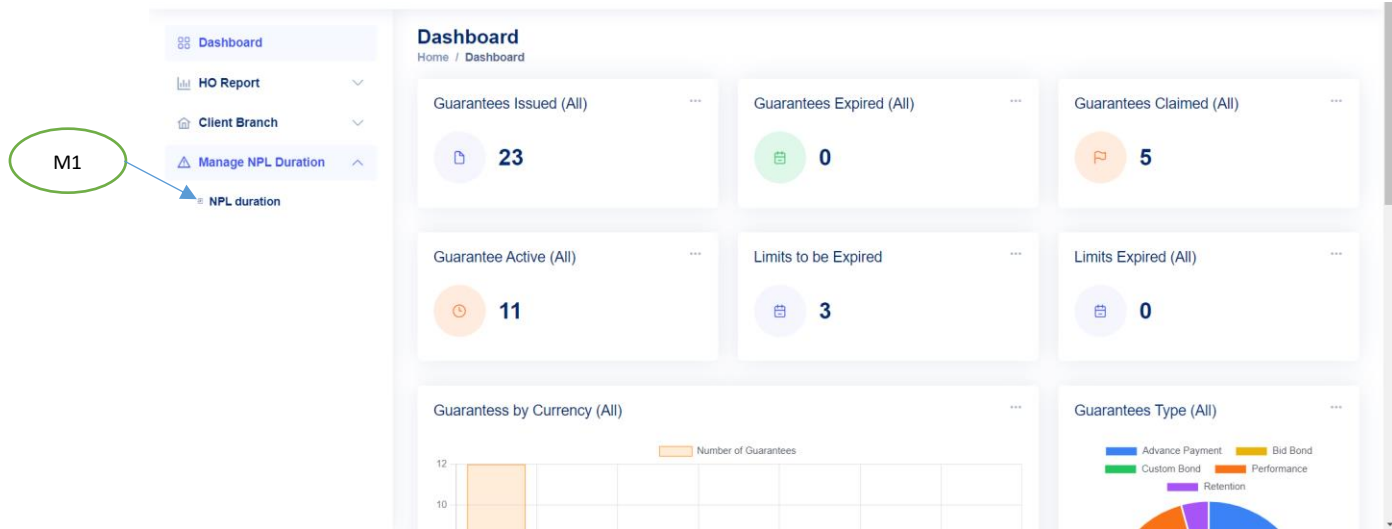


Figure 20: manage NPL duration sub-menu

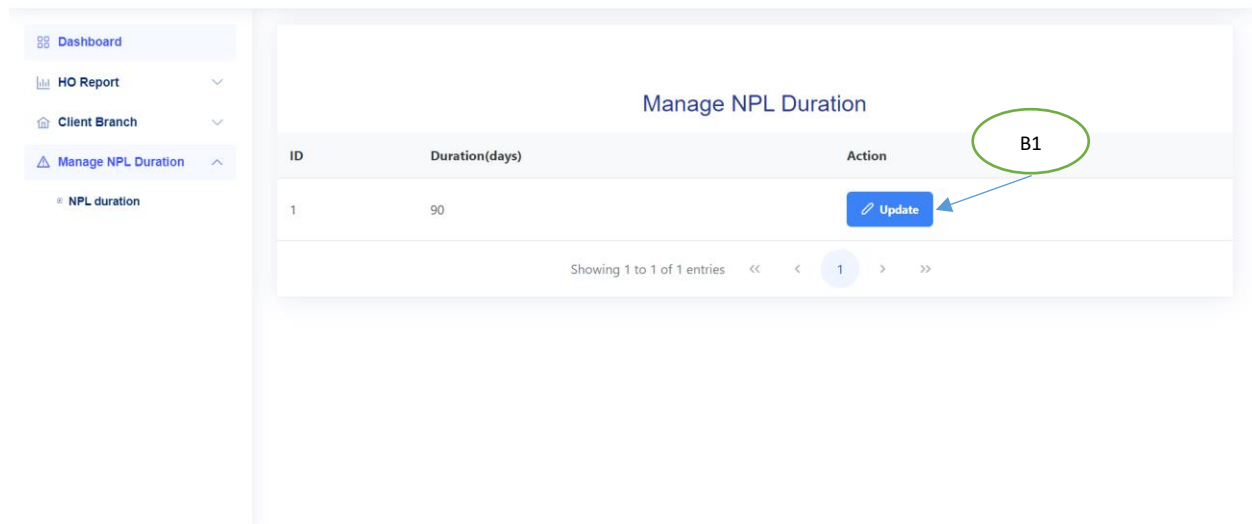


Figure 21: NPL duration

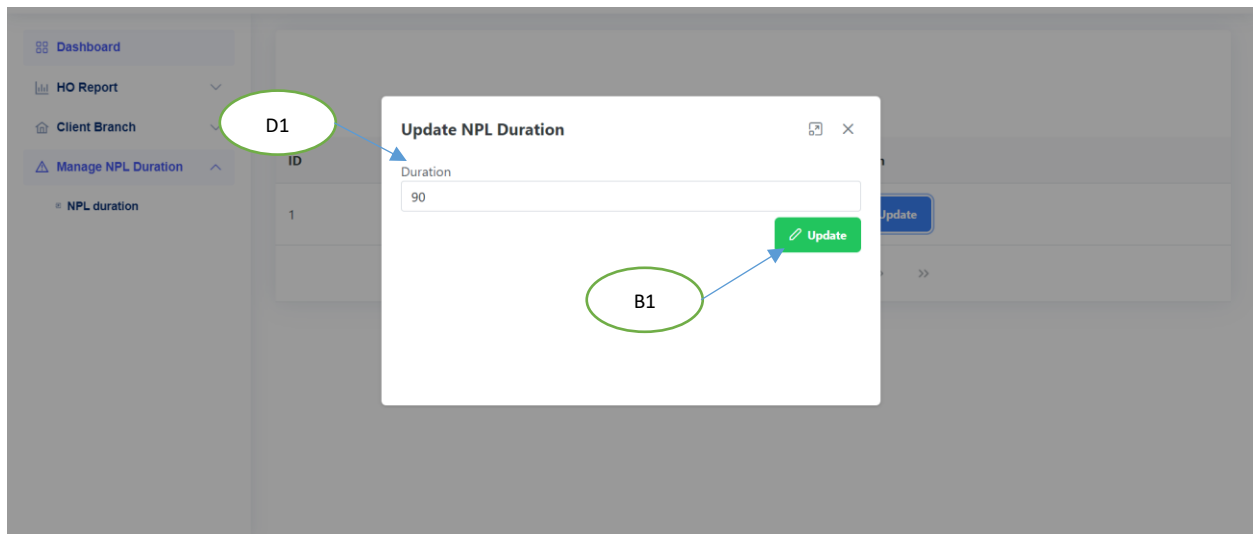


Figure 22: update NPL duration

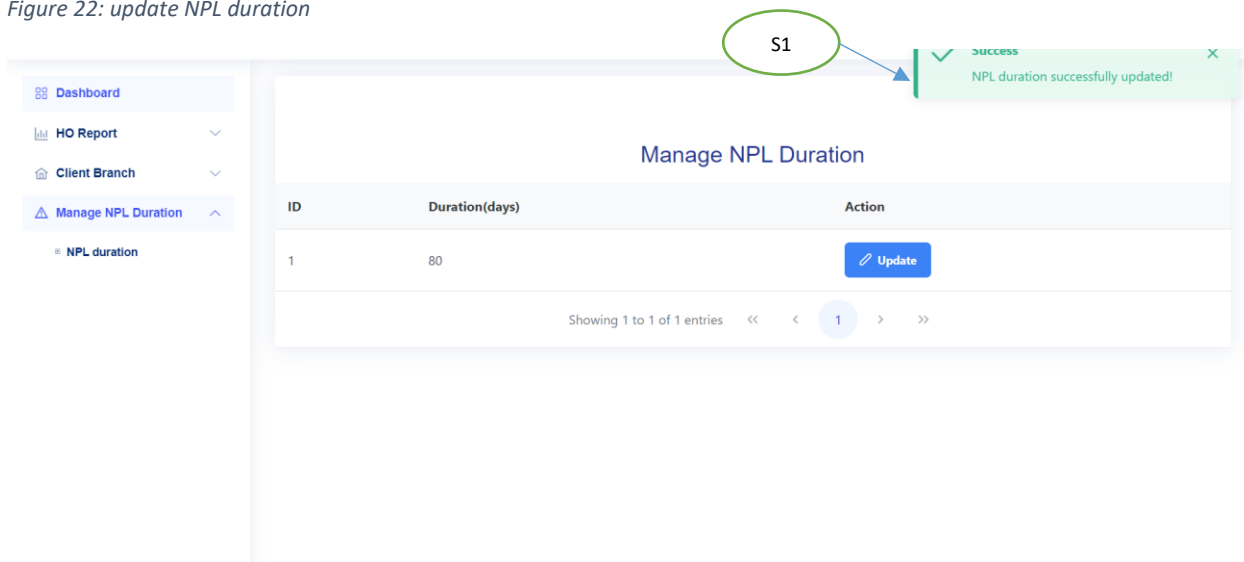


Figure 23: NPL duration updated