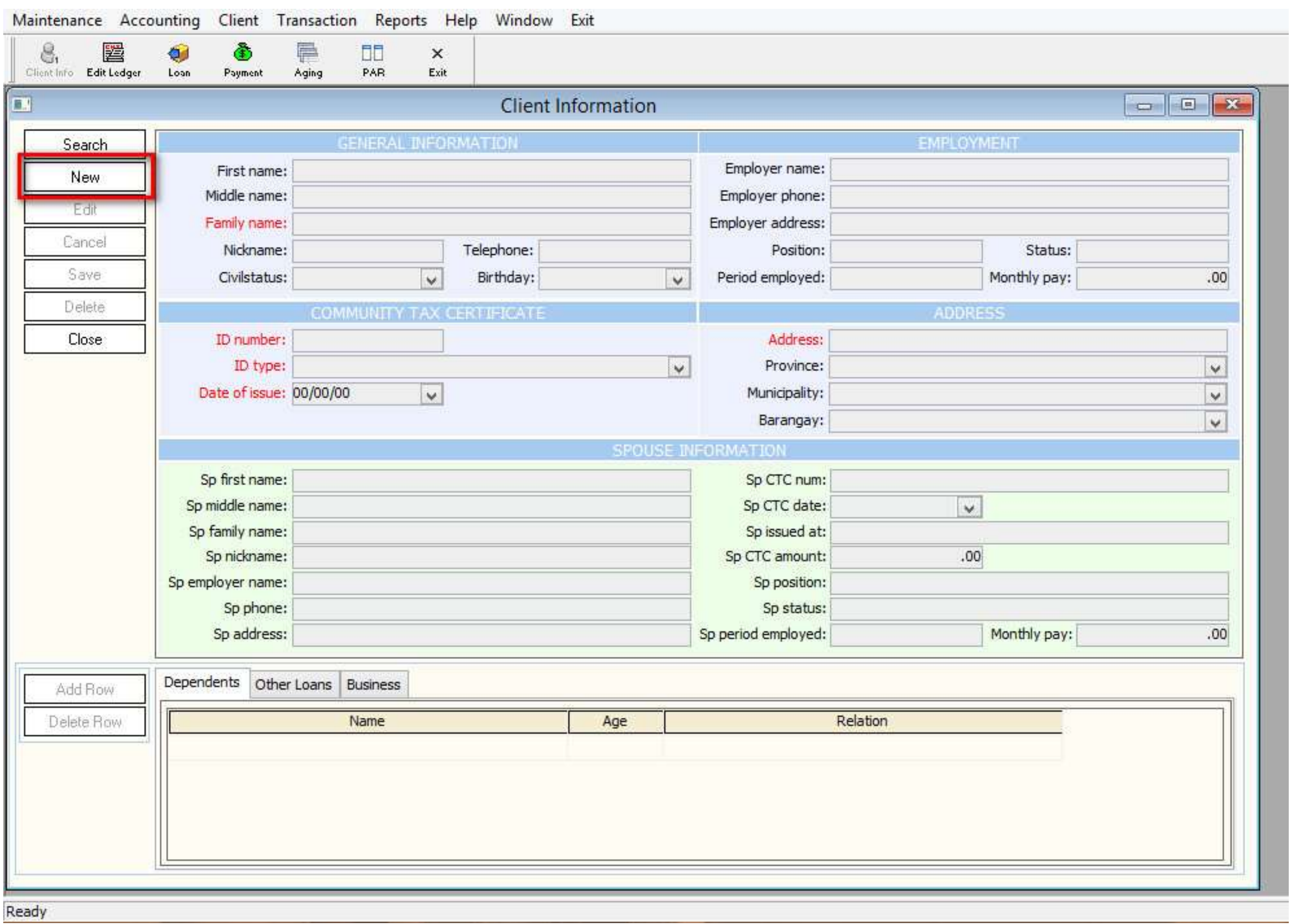
KNIGHTS Lending
How to Manage Client Records

How to Enter a New Client Record

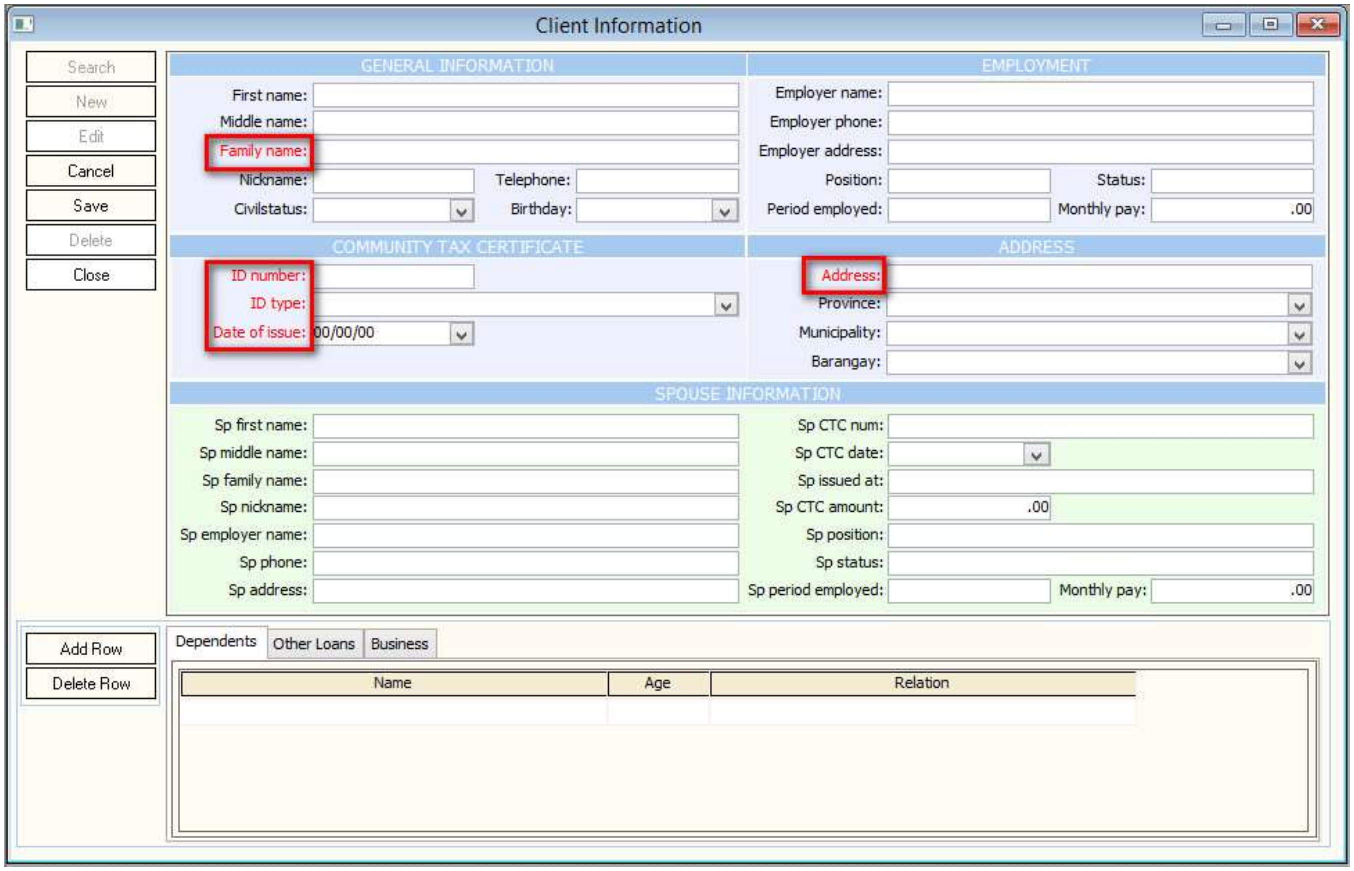
Reminder: You only need to encode a client's information ONCE. You do NOT need to encode it each time the client has a new loan.

1. Open the Client Information Window, it is the first item in the Main Menu.

2. Click the *New* Button. This will enable the entry fields (they will turn from grey to white) allowing you to enter the client information.

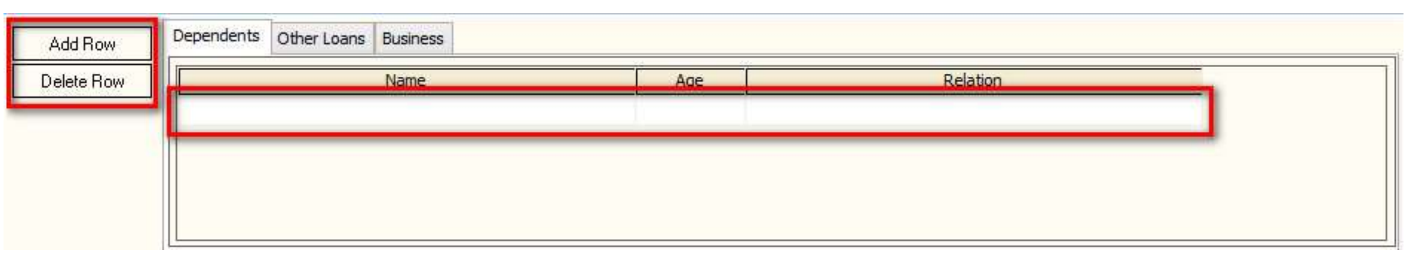


3. Enter the client information



Fields in RED are required and the record cannot be saved unless they are provided.

a. Entering Additional Client Information:

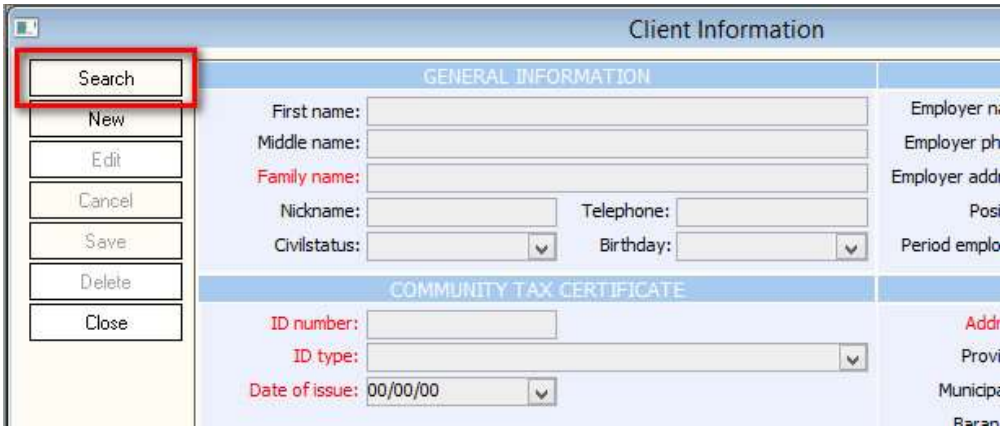


By default, a blank row has already been inserted for each tab (Dependents, Other Loans, and Businesses). If you need more rows, click the *Add Row* Button to insert a new blank row. To delete a row, click the *Delete Row* Button.

4. Once you are done, click the *Save* Button to commit your changes to the Database.

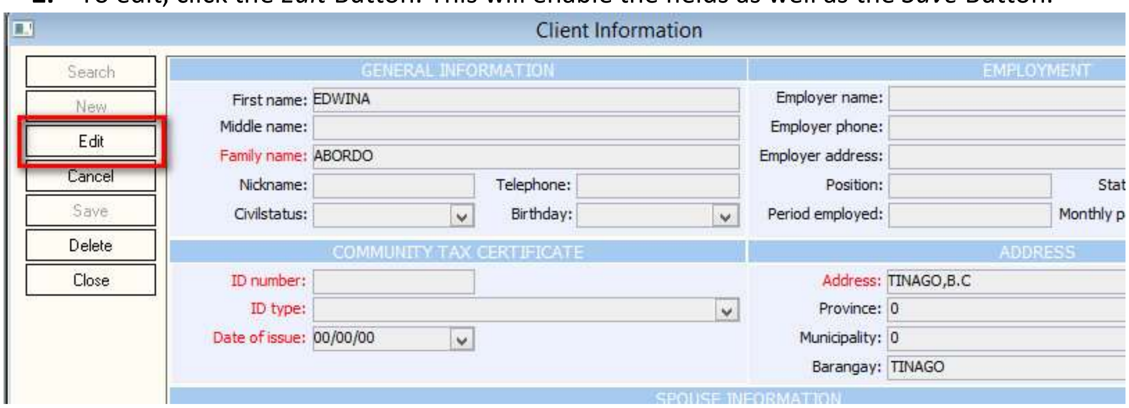
How to Edit or Delete a Client Record

1. Click the Search Button

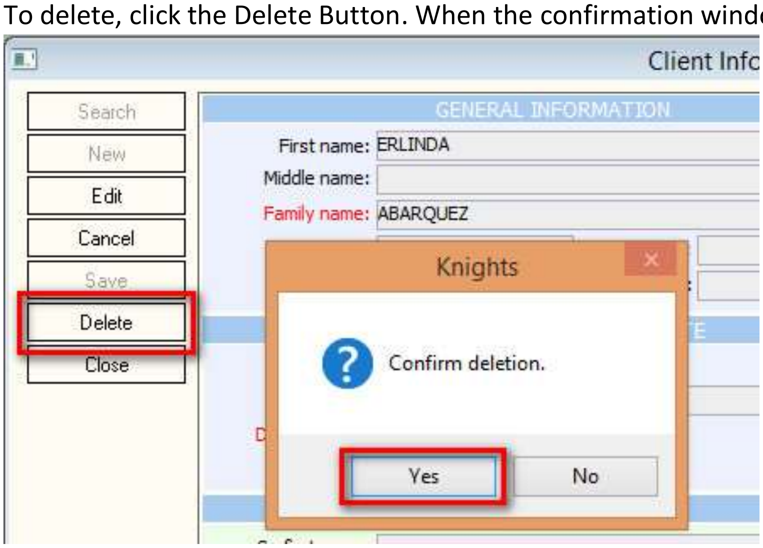


The *Client Search* Window will open. For more details on how to use this window go to *How to Use the Client Search Window.*

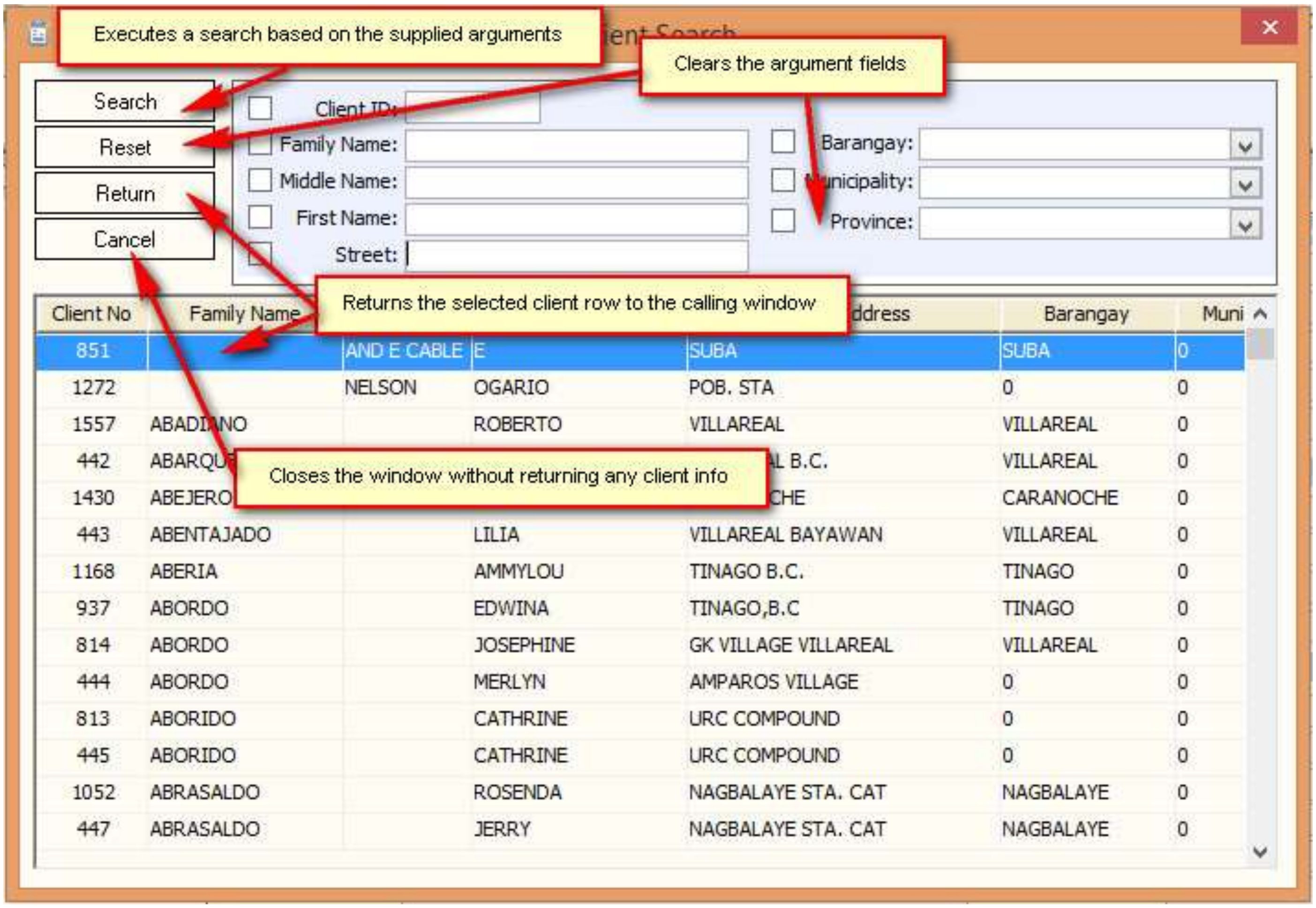
2. To edit, click the *Edit* Button. This will enable the fields as well as the *Save* Button.



3. Change or add client information.
4. Once you are done, click the *Save* Button to commit your changes to the Database.
5. To delete, click the Delete Button. When the confirmation window pops up, click *YES*.



How to Use the Client Search Window

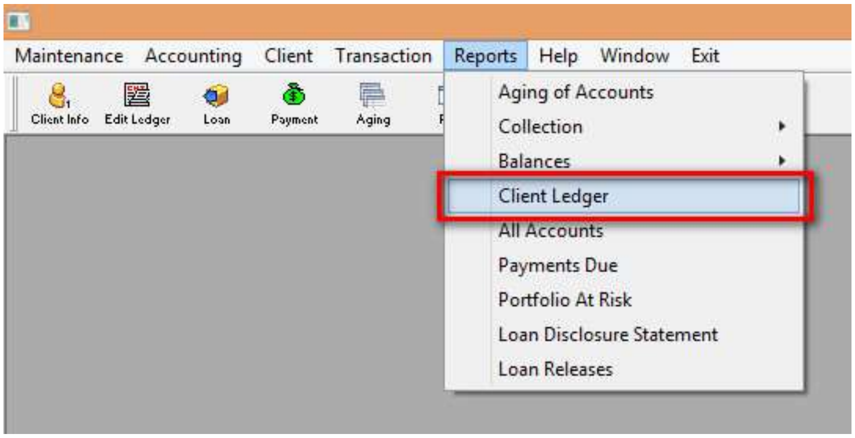


Functions of the Client Search Window buttons

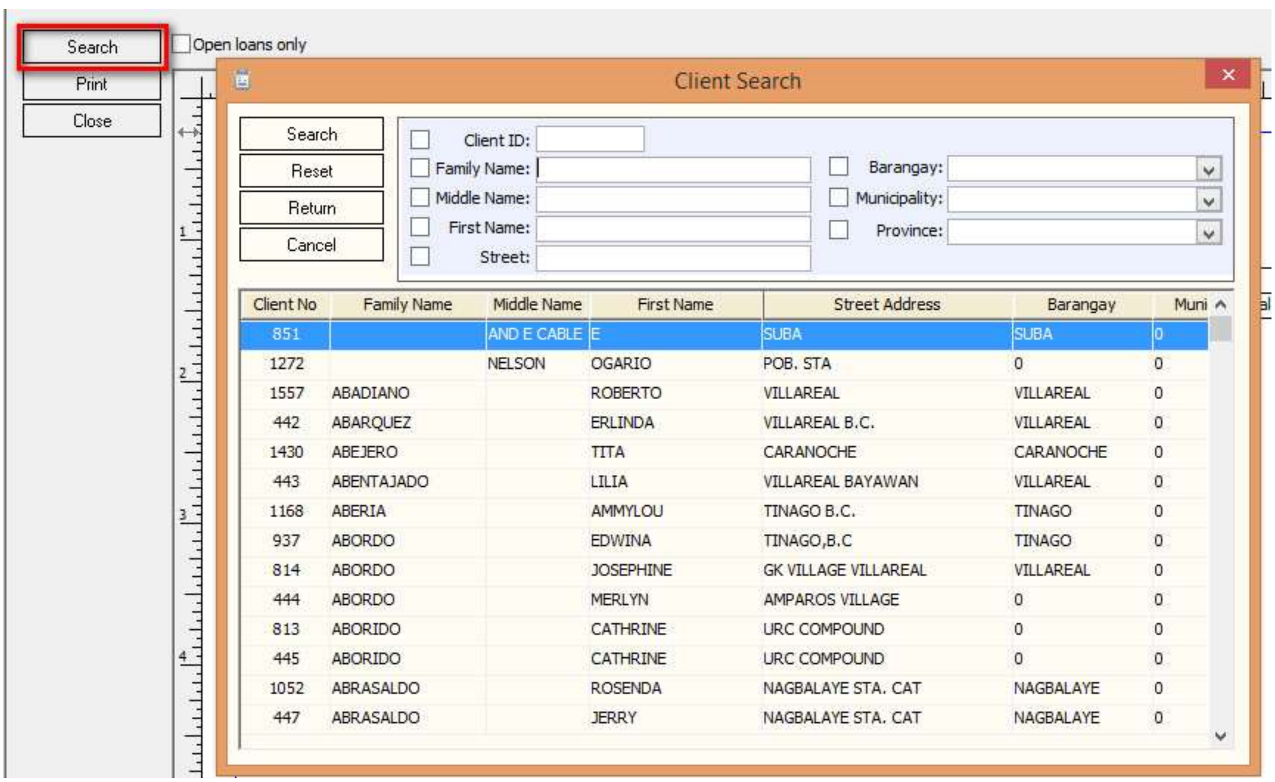
You can use any combination of the Search Arguments. The system will try to look for the record/s matching all the specified arguments. For example if you selected SUBA for Barangay and entered B for Family Name then clicked Search. The system will return all clients from SUBA with family names beginning with B.

How to View and Print a Client's Ledger

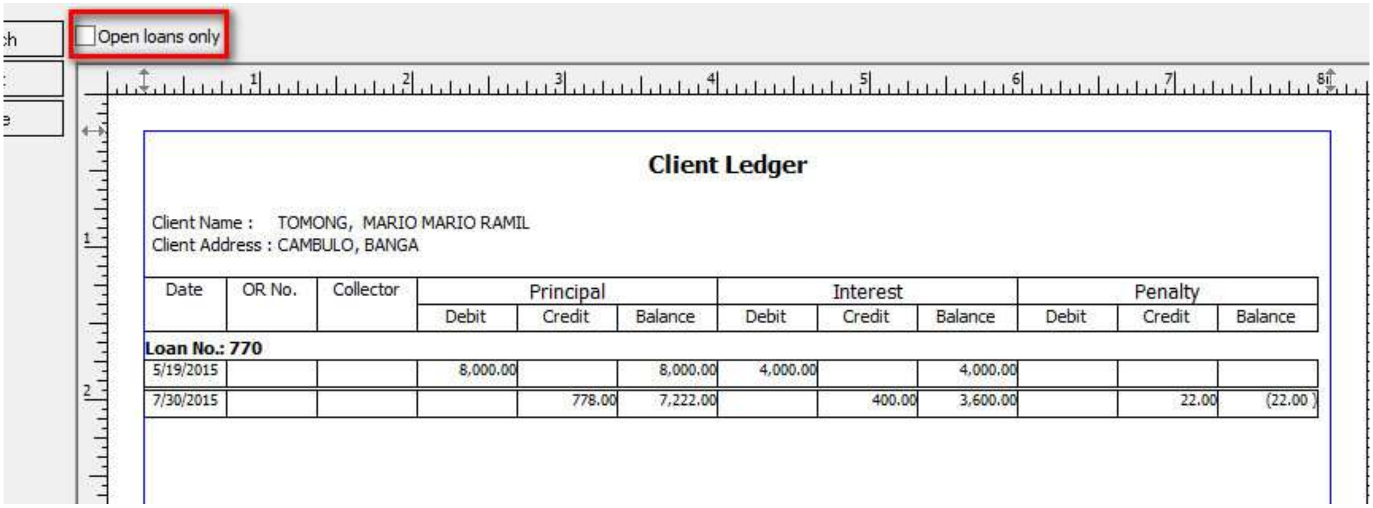
1. Select the *Reports* item in the Main Menu then click the *Client Ledger* item.



2. Select a client by clicking on the *Search* Button. The *Client Search* Window will pop up. Search for the client and then click the *Return* Button.



3. If you selected a row and clicked the *Return* Button, the system will proceed to generate that client's ledger.



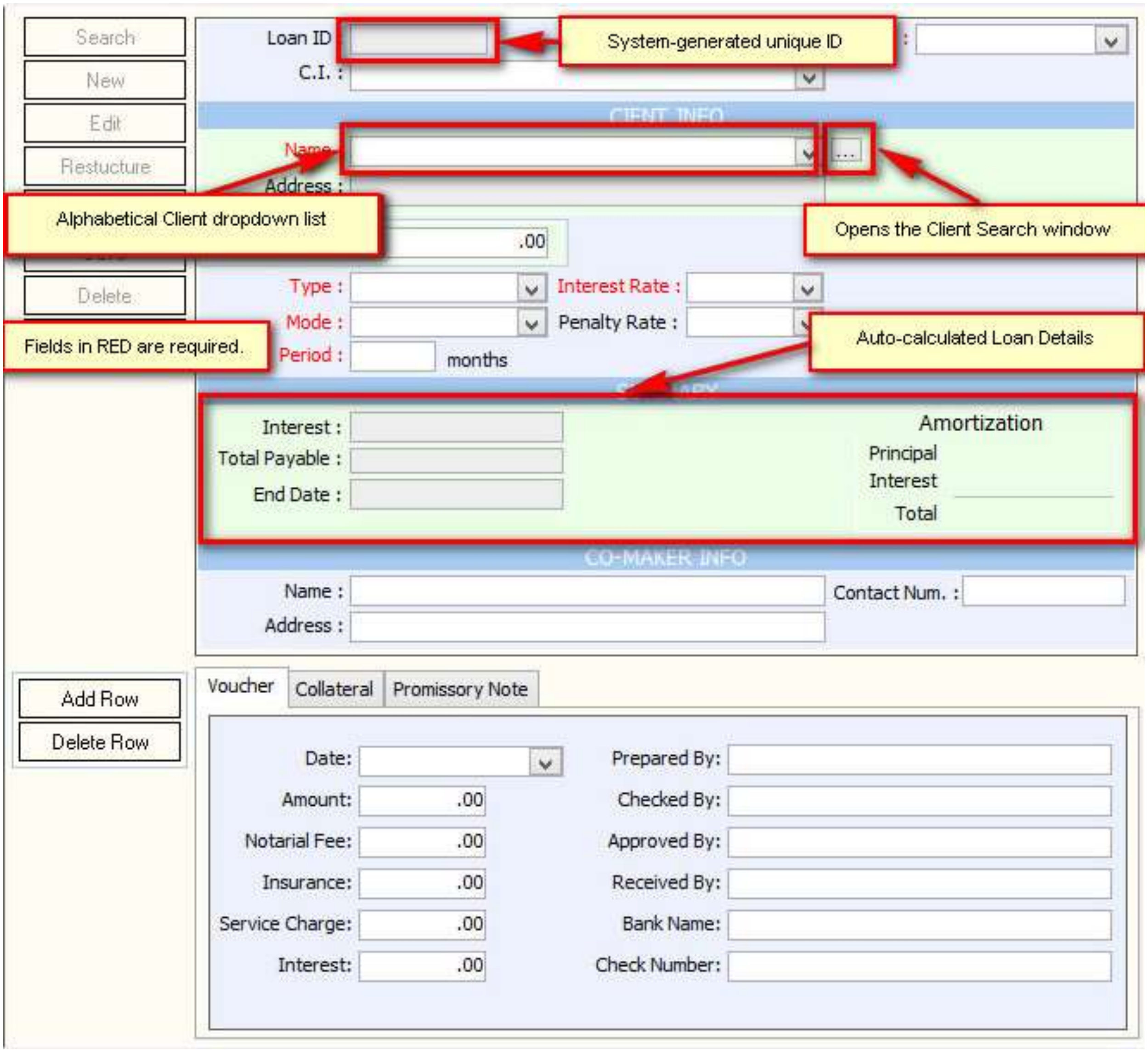
Client Ledger

Client Name : TOMONG, MARIO MARIO RAMIL
Client Address : CAMBULO, BANGA

Date	OR No.	Collector	Principal			Interest			Penalty		
			Debit	Credit	Balance	Debit	Credit	Balance	Debit	Credit	Balance
Loan No.: 770											
5/19/2015			8,000.00		8,000.00	4,000.00		4,000.00			
7/30/2015				778.00	7,222.00		400.00	3,600.00		22.00	(22.00)

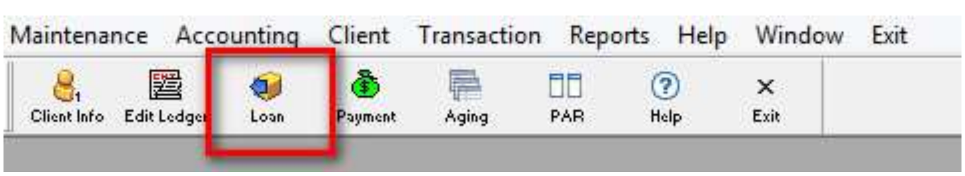
Clicking the *Open Loans Only* checkbox will filter out the closed/settled loans

How to Enter New Loans

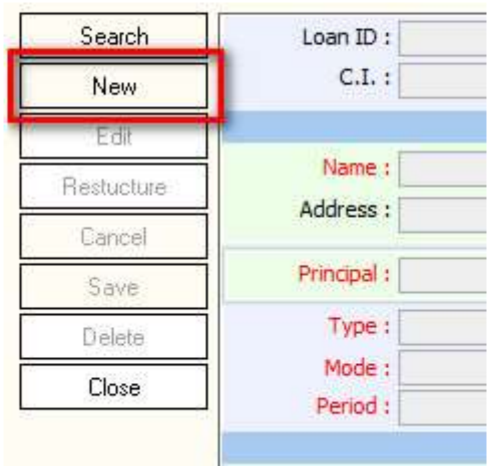


Field descriptions and features of the Loan Entry Window and

1. Open the Loan Entry Window



2. Click the New Button



3. Enter the Loan Information. Make sure to fill up all the fields in color RED.

4. Click the Save Button. If there are any required fields missing the system will prompt you to fill them up.