LIQUID BRIDGE

ADMIN

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DASHBOARD

New Applications

Applications made by users from different entities

| Search | Filter ▼ | Search |

#	Entity	Client name	Date	Status	View PDF
AP002	ABC Company	Jane Doe	23/07/2022	Apply for finance	PDF
AP002	ABC Company	Jane Doe	23/07/2022	Apply for finance	PDF
AP002	ABC Company	Jane Doe	23/07/2022	Apply for finance	PDF
AP002	ABC Company	Jane Doe	23/07/2022	Declined	PDF
AP002	ABC Company	Jane Doe	23/07/2022	Financing in progress	PDF
AP002	ABC Company	Jane Doe	23/07/2022	Financing in progress	PDF

< 1 of 3 >

Quote Generator

✏ Edit details

- ☑ Quote no
- ☑ Date
- ☑ Client name
- ☑ Initial Amount Required
- ☑ Estimated settlement date

Property details

- ☑ ERF
- ☑ Portion
- ☑ Stand
- ☑ Extension

Fees

Discounting rate	
Initiation fee	
Monthly service fee	

Cancel   **Save changes**

Click here to view T's & C's

Transactions history

Transactions made by users for new applications

#	Entity	Client name	Date	Amount	View PDF
AP0...	ABC Co...	Jane Doe	23/07/2022	R50 000	PDF
AP0...	ABC Co...	Jane Doe	23/07/2022	R100 000	PDF
AP0...	ABC Co...	Jane Doe	23/07/2022	R60 000	PDF

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User changes

User changes made by super users and admin

Entity	Client name	Date	Action
ABC Co...	Jane Doe	23/07/2022	Normal user to No Access
Jane Doe	Jane Doe	23/07/2022	Normal user to Super user
Jane Doe	Jane Doe	23/07/2022	No Access to Normal user

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New Applications
Applications made by users from different entities

Search		Filter ▼	Search

#	Entity	Client name	Date	Status	View PDF
AP002	ABC Company	Jane Doe	23/07/2022	Apply for finance	PDF
AP002	ABC				
AP002	ABC				
AP002	ABC				
AP002	ABC				
AP002	ABC Company	Jane Doe	23/07/2022	Financing in progress	PDF

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Quote Generator

✎ Edit details

✓ Quote no   ✓ Date
✓ Client name
✓ Initial Amount Required
✓ Estimated settlement date

Property details

✓ ERF   ✓ Portion
✓ Stand   ✓ Extension

Fees

Discounting rate

Initiation fee

Monthly service fee

Cancel   Save changes

Click here to view T's & C's

Quote Generator

Are you sure you want to make changes to the Quote Generator?

Yes	No

Transactions history
Transactions made by users for new applications

#	Entity	Client name	Date	Amount	View PDF
AP0...	ABC Co...	Jane Doe	23/07/2022	R50 000	PDF
AP0...	ABC Co...	Jane Doe	23/07/2022	R100 000	PDF
AP0...	ABC Co...	Jane Doe	23/07/2022	R60 000	PDF

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User changes
User changes made by super users and admin

Entity	Client name	Date	Action
ABC Co...	Jane Doe	23/07/2022	Normal user to No Access
Jane Doe	Jane Doe	23/07/2022	Normal user to Super user
Jane Doe	Jane Doe	23/07/2022	No Access to Normal user

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🔔

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PROFILE

My profile details

✏️ Edit profile

Full Names

ID number

Surname

Cellphone no.

E-mail address

Password

`* * * * * * * * * * * *`

Permission level

| Super admin ▼ |

| Normal admin |
| **Super admin** |

Cancel

Save

LIQUID
BRIDGE

ADMIN

Name Surname
Email address

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PROFILE

My profile details

✏ Edit profile

Full Names

ID number

Surname

Cellphone no.

E-mail address

Password

****

Permission level

Super admin ▼

Normal admin

Super admin

Profile details

Are you sure you want to make changes to your profile details?

Yes	No

Cancel

Save

PROFILE

ADMIN

Name Surname
Email address

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My profile details

Edit profile

Full Names

ID number

Surname

Cellphone no.

E-mail address

Password

****

Permission level

Super admin ▼

Normal admin

Super admin

Password updated

Are you sure you want to change your password?

Yes

No

Cancel

Save

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ENTITY PROFILE

Create an entity profile

Type of Entity | *Company, Closed Corporation, Trust, etc*

Entity Registered name |

Trading name |

Registration number |

Entity physical address | *Chosen domicillium citandi et executandi*

Entity representative full names |

Contact number | Work tel | E-mail address |

USER PROFILES FOR THE ENTITY ⊕ Add a user

Full Names | ▼

Permission level | **Super user**

Cancel

Save

ADMIN

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Edit profile

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ENTITY PROFILE

Create an entity profile

Type of Entity	*Company, Closed Corporation, Trust, etc*	
Entity Registered name		
Trading name		
Registration number		
Entity physical address	*Chosen domicillium citandi et executandi*	
Entity representative full names		

Contact number		Work tel		E-mail address	

USER PROFILES FOR THE ENTITY   ⊕ Add a user

Super User full name	Yellow Mustard ▼	Permission level	Super user
E-mail address	J.doe@abccompany.com	ID number	8908764689085
Cellphone no.	056 917 3690	Designation	Partner

⊖ Delete user

Cancel   **Save**

LIQUID
BRIDGE

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Create a entity profile

Type of Entity   Company, Closed Corporation, Trust, etc   Entity Registered name

Trading name   Registration number

Entity physical address   Chosen domicillium citandi et executandi

Entity representati

Contact number   E-mail address

Entity profile created

Great! A new entity profile has been created, you will be able to view the entity under the user tab.

Great   **Cancel**

USER PROFILES   + Add a user

Super User full name   Yellow Mustard   ▼   Permission level   Super user

E-mail address   J.doe@abccompany.com   ID number   8908764689085

Cellphone no.   056 917 3690   Designation   Partner

— Delete user

Cancel   Save

LIQUID
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ENTITY APPLICATIONS

| All Applications | Draft Applications |

Search for users / entity | Filter ▼ | Search

#	Entity	Client name	Posted date	Funds sent?	Status	Action	Settlement statement
001	ABC Company	Jane Doe	23/07/2022	Yes	Active ▼	🗑 Delete	PDF Send
002	ABC Company	Jane Doe	23/07/2022	Yes	Closed ▼	🗑 Delete	PDF Send
AP1	ABC Company	Jane Doe	23/07/2022	No	On hold ▼	🗑 Delete	PDF Send
AP2	ABC Company	Jane Doe	23/07/2022	Yes	Active ▼	🗑 Delete	PDF Send

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ENTITY APPLICATIONS

All Applications	Draft Applications

Search for users / entity	Filter ▼	Search

#	Entity	Client name	Posted date	Funds sent?	Status	Settlement statement
001	ABC Company	Jane Doe	23/07/2022	Yes	Active ▼	PDF Send
002	ABC Co				Closed ▼	PDF Send
AP1	ABC Co				On hold ▼	PDF Send
AP2	ABC Co				Active ▼	PDF Send

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Agent application

Are you sure you want to delete this application?

Yes	No

Ts & Cs. |. Help

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X

001   ABC Company

Client name: **Jane Doe**
Posted date: **23/07/2022**

REASONS FOR CANCELLING APPLICATION

Lorem epsum

SELLER'S DETAILS

Type of seller | **Juristic Person**

Full Names | **Jane Samantha**   Surname | **Doe**

Physical address | **386 unit 76 Jambo Estate, Mumba street, Portland, South Africa, 2098**

Cellphone no. | **056 917 3690**   Work tel | **011 467 9024**

E-mail address | **J.doe@abccompany.com**   ID number | **8908764689085**

TRANSACTION DETAILS

Property Description "The property":

ERF | | Portion | | Stand | | Extension |

Purchaser Name | | Purchaser Surname |

Purchase Price | R | Deposit Paid | R

Bond approved for | R | Bond cancellation | R

Property Practitioner commission | R | Rates & taxes payable | R

Expected date of lodgement | DD / MM / YYYY | Specified total proceeds of sale (amount due Liquid Bridge) | R

Ts & Cs. |.   Help

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USERS

Add a user

Search for users / entity | Filter ▼ | Search

Users	Entity	Date added	Email address	Permissions	Status
1. Simon Cole	ABC Company	23/07/2022	simoncole@abc...	Super user	Removed ▼
				Super user	Active
2. Jack Pete	Hello Hope Attorneys	23/07/2022	jackpete@abco...	Normal user	Removed
				Approver	Blocked
3. John Brand	Law Attorneys	23/07/2022	johnbrand@abc...	No access	Active ▼
4. Simon Cole	LBF Admin	23/02/2022	simoncole@abc...	Super admin ▼	Active ▼
5. Jack Pete	LBF Admin	23/03/2022	jackpete@abco...	Normal admin ▼	Blocked ▼
6. John Brand	Law Attorneys	23/07/2022	johnbrand@abc...	Approver ▼	Active ▼

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ADMIN

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Add a user

Search for users / entity   Filter ▼   Search

Users	Entity	Date added	Email address	Permissions	Status
1. Simon Cole	ABC Company	23/07/2022	simoncole@abc...	Super user	Removed ▼
				Super user	Active

X

ABC Company
Simon Cole   ✎ Edit profile

E-mail address   [s.cole@abccompany.com]   ID number   [8908764689085]   Cellphone no.   [056 917 3690]

Password   [* * * * * * * * * * * *]   Permission level   [Super user ▼]

(Cancel)   (Save changes)

#	Application	Date added	Received funds?	Status	Settlement statement	
#001	ABC Company application	23/07/2022	No	Cancelled	PDF	View application
#002	Brim Building finance	23/07/2022	Yes	Active	PDF	View application

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USERS

+ Add a user

Search for users / entity   Filter ▼   Search

	Users	Entity	Date added	Email address	Permissions	Status
1.	Simon Cole	ABC Company	23/07/2022	simoncole@abc...	Super user	Removed ▼
2.	Jack Pete	Hello Hope Attorneys	23/07/2022	jackpete@abco...		
3.	John Brand					
4.	Simon Cole				Super admin ▼	Active ▼
5.	Jack Pete				Normal admin ▼	Blocked ▼
6.	John Brand				Approver ▼	Active ▼

Super user
Normal user
Approver
No access

Active
Removed
Blocked

Active ▼

User details

Are you sure you want to save
the changes to this user profile?

Yes   No

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Ts & Cs. |.   Help

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USERS

Add a user

Search for users / entity   Filter ▼   Search

Users	Entity	Date added	Email address	Permissions	Status
1. Simon Cole	ABC Company	23/07/2022	simoncole@abc...	Super user	Removed ▼

X

ADDING A NEW USER

Full names   Paul Johns

Surname   Smith   ID number   0000000000000

Email address   paulj@abccompany.com   Cellphone no.   075 980 6759

Designation   Partner   Permission level   No access ▼   ☑ This user is an Approver

Entity   Normal admin ▼

☑ I confirm that I have the necessary authorisation to apply for a new user on behalf of my organisation.

Cancel   Submit new user

Ts & Cs. |.   Help

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USERS

Add a user

Search for users / entity   Filter ▼   Search

Users	Entity	Date added	Email address	Permissions	Status
1. Simon Cole	ABC Company	23/07/2022	simoncole@abc...	Super user	Removed ▼
				Super user	Active
2. Jack Pete	Hello Hope Attorneys	23/07/2022	jackpete@abco...	Normal user	Removed
				Approver	Blocked
3. John Brand				No access	Active ▼
4. Simon Cole			...oc...	Super admin ▼	Active ▼
5. Jack Pete			...o...	Normal admin ▼	Blocked ▼
6. John Brand			...oc...	Approver ▼	Active ▼

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New user added

Great! A new user has been
added. You can view this
user under the User tab.

Great   Cancel

Ts & Cs. |.   Help

PERMISSIONS SETTINGS

ADMIN

Name Surname
Email address

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Logout

Super user	Normal user	Approver user	No access user	Super admin user	Normal admin user

Add a new setting   ✚ Add

- ☑ View the dashboard
- ☐ Change quote generator pricing
- ☑ Edit user profile details
- ☑ Add/Remove users from Agent profile
- ☑ Block users form using the platform
- ☑ Change/Update user permissions
- ☑ Edit applications (draft)
- ☑ Create Applications
- ☑ Enable/Disable creating Applications for Agent

- ☑ View submitted Application on PDF
- ☐ Edit quote generator Ts & Cs
- ☐ Create an entity profile
- ☑ Change the status of an application
- ☑ Remove users
- ☑ Change funds received status
- ☑ View draft Applications
- ☑ View user directory
- ☑ Enable/Disable creating Applications for the system

- ☑ Accept approved Finance
- ☑ Add a new users
- ☐ Edit entity profile details
- ☐ Edit an application accordingly
- ☐ Remove entity
- ☑ Create a quote via the quote generator
- ☑ View entity applications
- ☑ Add/Remove Approver
- ☑ Submit applications

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PERMISSIONS SETTINGS

| Super user | Normal user | Approver user | No access user | Super admin user | Normal admin user |

Add a new setting   + Add

- ☑ View the dashboard
- ☑ Change quote generator pricing
- ☑ Edit user profile details
- ☑ Add/Remov
- ☑ Block users
- ☑ Change/Up
- ☑ Edit applica
- ☑ Create a ne

- ☑ View a PDF of an application
- ☑ Edit quote generator Ts & Cs
- ☑ Create an entity profile

- ☑ Edit quote generator
- ☑ Create a new users
- ☑ Edit entity profile details
- ☑ Edit an application accordingly
- ☑ Remove entity
- ☑ Create a quote via the quote generator
- ☑ View entity applications

Permissions changed

Are you sure you want to make
changes to the user permissions?

| Yes | No |

Ts & Cs. |.   Help