RBA Consultancy and General Services

Client Monitoring System

User Manual v1.0

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Introduction

RBA Consultancy and General Services is a duly recognized business entity by the Department of Trade and Industry, Department of Labor and Employment and Bureau of Immigration. It was established in 2001 through the leadership and management of Mr. Ricardo B. Alegre. His expertise and efficient processing of working permits and immigration visas gained the respect of big companies as his clients. RBA Consultancy and General Services is committed to bringing 100% satisfaction to its clients, that's why they strive hard to give the clients all the services that they need in the most efficient and economical way with such excellence.

To give a better satisfaction with their user, developers implemented a system - R.B.A. Consultancy & General Services - Client Servicing System is intended to work as a web-based system which support R.B.A administrators' and clients' needs such as adding and updating clients' information, automating the processing of monitoring of clients' transactions.

The RBA Consultancy and General Services - Client Servicing System is primarily for the use of RBA General and Consultancy to systematize their processes of accommodating the needs of their expatriate clients.

The Client Servicing System will be managed by the Company's administrators as well as the System's developers. The system allows them to add and modify the clients' information and monitor their transaction statuses.

Since the system is web-based, clients will be provided an electronic Visa Application in which they will fill out with their necessary personal information. Moreover, submitting of required documents will be automated. Clients' can securely upload their documents directly in the system. This documents together with clients' information will be stored in the system's database.

However, the system will not cover the submission of the clients' information and other required documents directly to the government offices via Internet but it is integrated with the ability to print out those forms. The administrators will need manually print out those forms and documents, and then submit it personally to the government offices for the processing of the clients' Visa.

Furthermore, clients can monitor their application and transaction status through the system in addition to the administrators' notifications through email. Unfortunately, the system will not stipulate any means of online payment.

Functionalities

Functionalities

RBA Consultancy and General Services – Client Monitoring System mainly has two ends: the Frontend which refers to the part of the web that users interact with. Backend for the administrator Side where they can access and manage the information of their clients, it can access the database of the system.

Frontend Functionalities

1. **System Registration**
   This section discusses the step or instruction needs to be followed by the users of the system upon logging into the system. This is done to provide access to the Client of the Organization.

   - Step 1: Clients need to click the Signup button in the navigation bar.
   -

Figure 1.1 Signup Button

   - Step 2: Client would be redirected to the Signup Page of the System.

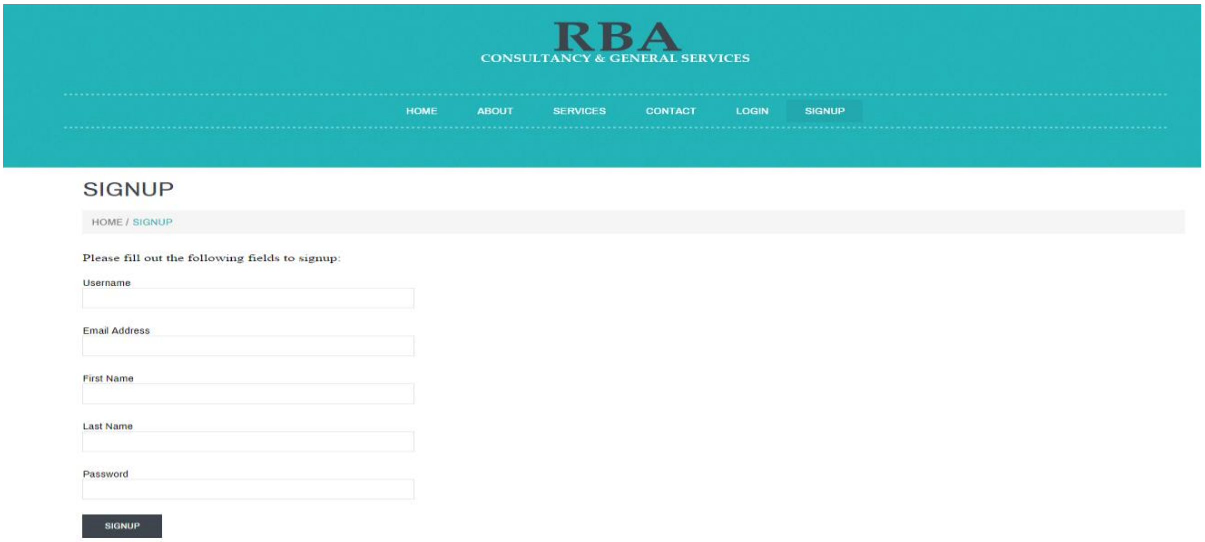


Figure 1.2 Signup Page

- Step 3: Fill up the Fields with the necessary information, like what shown below.

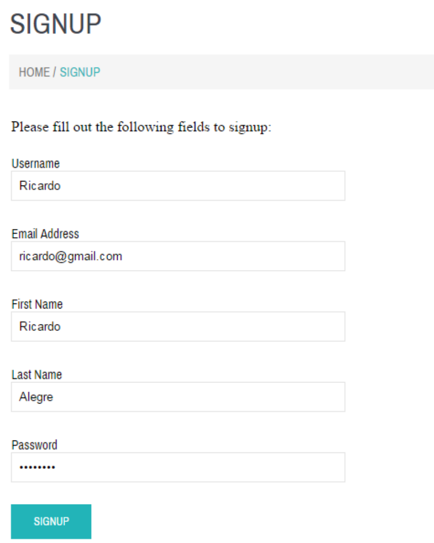


Figure 1.3 Signup Form with Client's Information

- Step 4: Click the Signup Button after you filling out the information.

Figure 1.4 Signup Button

- Step 5: After Signing up, User would be redirected to the Home Page and He/she has now access to the Website. On the navigation bar, user's username would be there, indicating that the client was logged on to the system.

Figure 1.5 Navigation Bar with Client's Username

2. System Login

This section discusses the step or instruction needs to be followed by the users of the system for logging In to the System.

- Step 1: Clients need to click the Login Button to the navigation Bar.

Figure 1.6 Login Button

- Step 2: Client would be redirected to the Login Page of the Website.

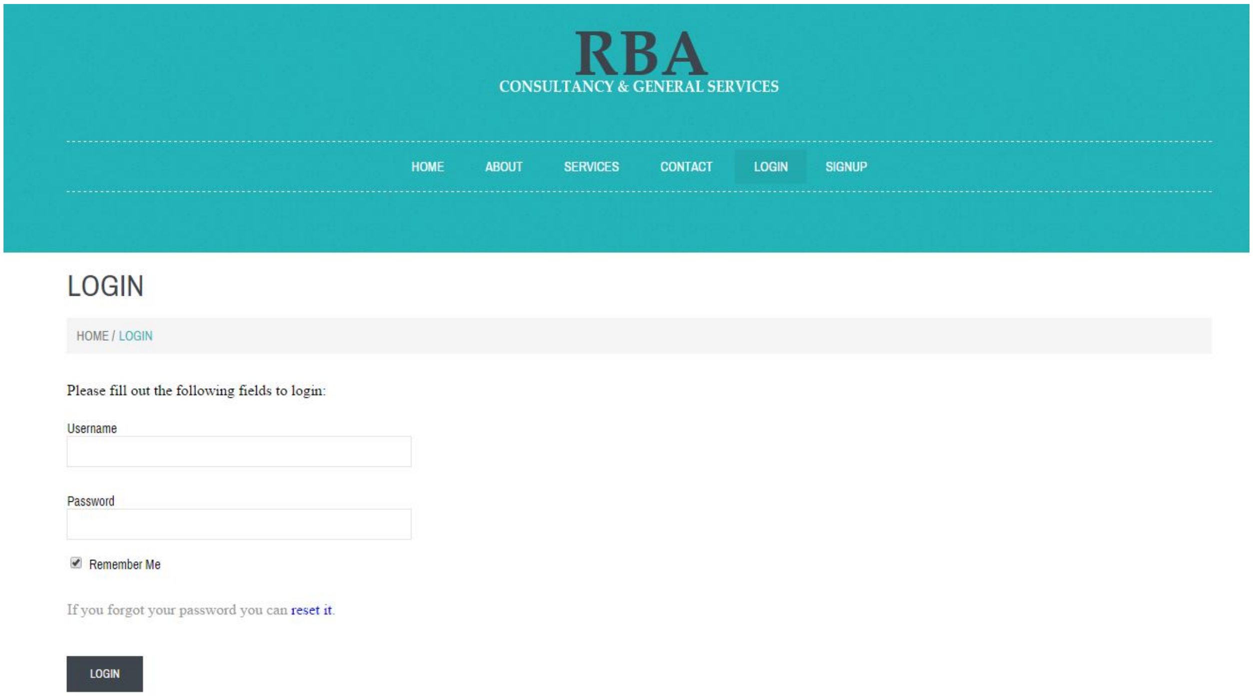


Figure 1.7 Login Page

- Step 3: Fill out the Information field with your Username and Password.

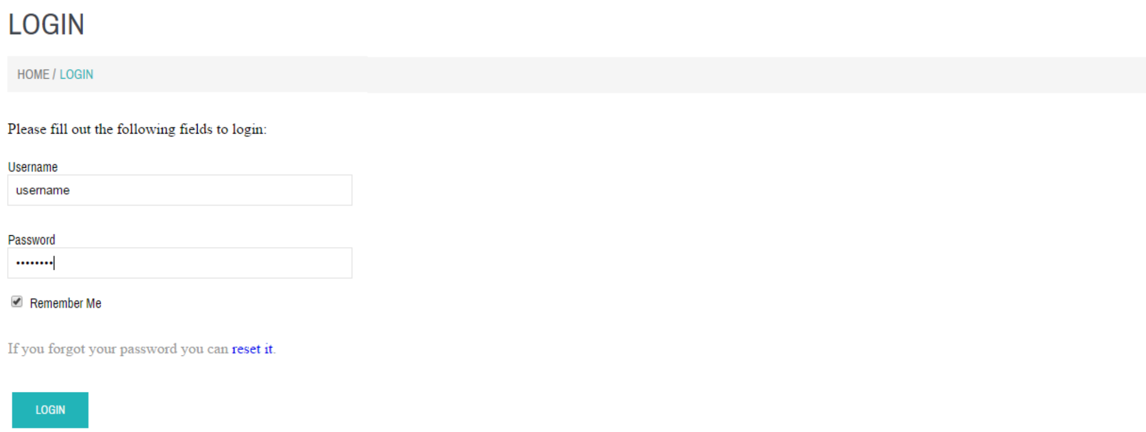


Figure 1.8 Login Page with Client's username and password

- Step 4: After filling out the information field, Click Login Button.

Figure 1.9 Login Button

3. Client's Account Page

This section discusses the step or instruction needs to be followed by the users of the system to be able for them to view their Account Information.

- Step 1: On the navigation Bar, Click the My Account Button.

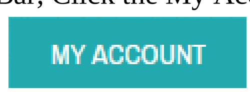


Figure 1.10 My Account Button

- Step 2: Client would be redirected to My Account Page, and he/she would see his/her a

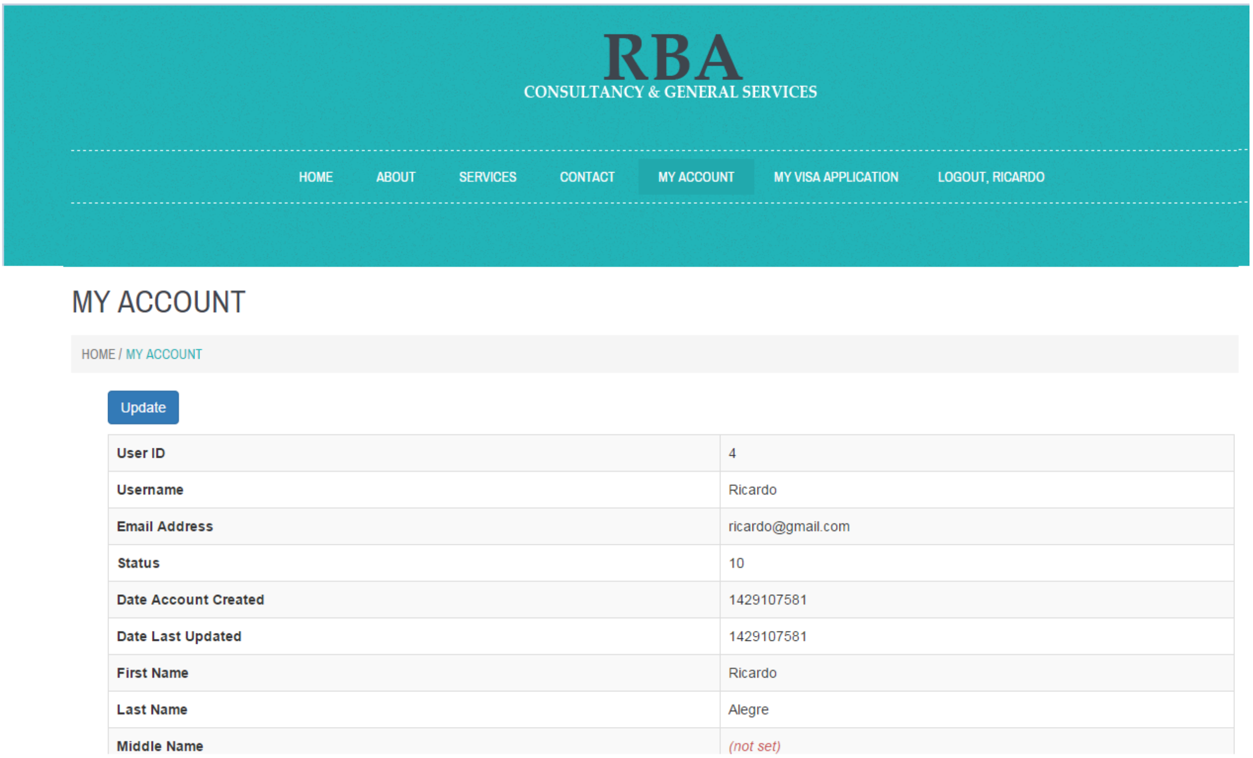


Figure 1.11 My Account Page

4. **Client will update their Information**

   This section discusses the step or instruction needs to be followed by the users of the system to be able for them to update their Information.

   - Step 1: On the navigation Bar, Click the My Account Button.

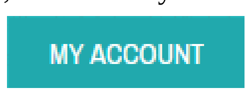


Figure 1.12 My Account Button

   - Step 2: Client would be redirected to My Account Page, on that Page Click the Update Button.

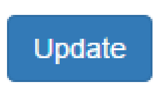


Figure 1.13 Update Button

- Step 3: Fill out the Information field and Click Save after updating it.

5. View Visa Transaction

This section discusses the step or instruction needs to be followed by the users of the system to be able for them to view their Visa Transaction.

- Step 1: Click the Visa Transaction Button on the navigation bar.

Figure 1.14 Visa Transaction Button

- Step 2: Client would be redirected to Visa Transaction Page.

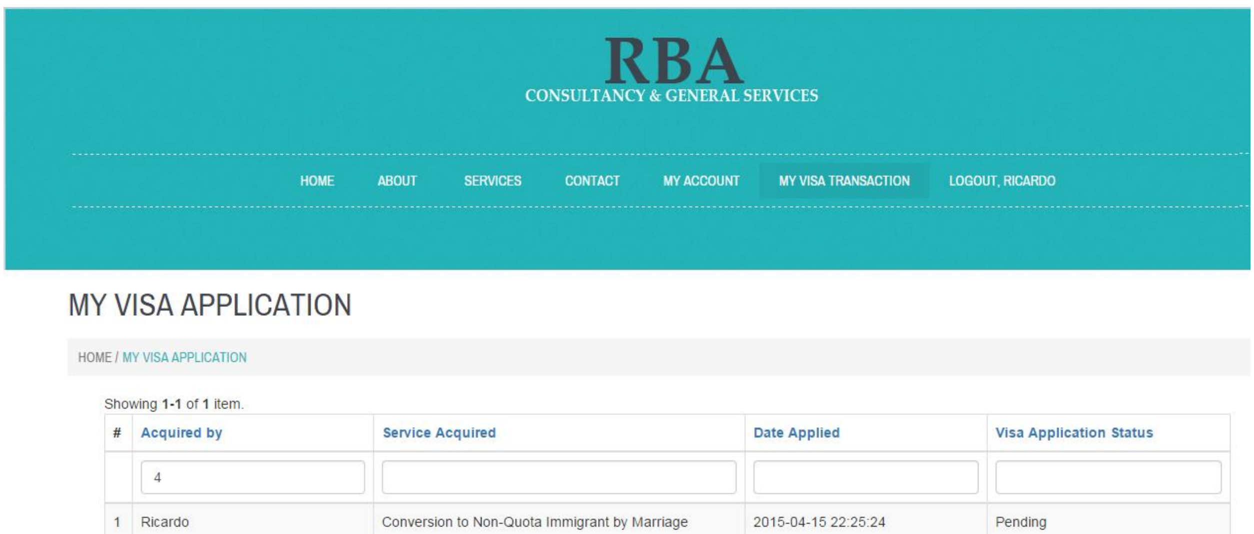


Figure 1.15 Visa Transaction Page

6. Apply for Visa Services

This section discusses the step or instruction needs to be followed by the users of the system to be able for them to apply for services.

- Step 1: Click the Services Button

Figure 1.16 Service Button

- Step 2: User will be redirected to Service Page.

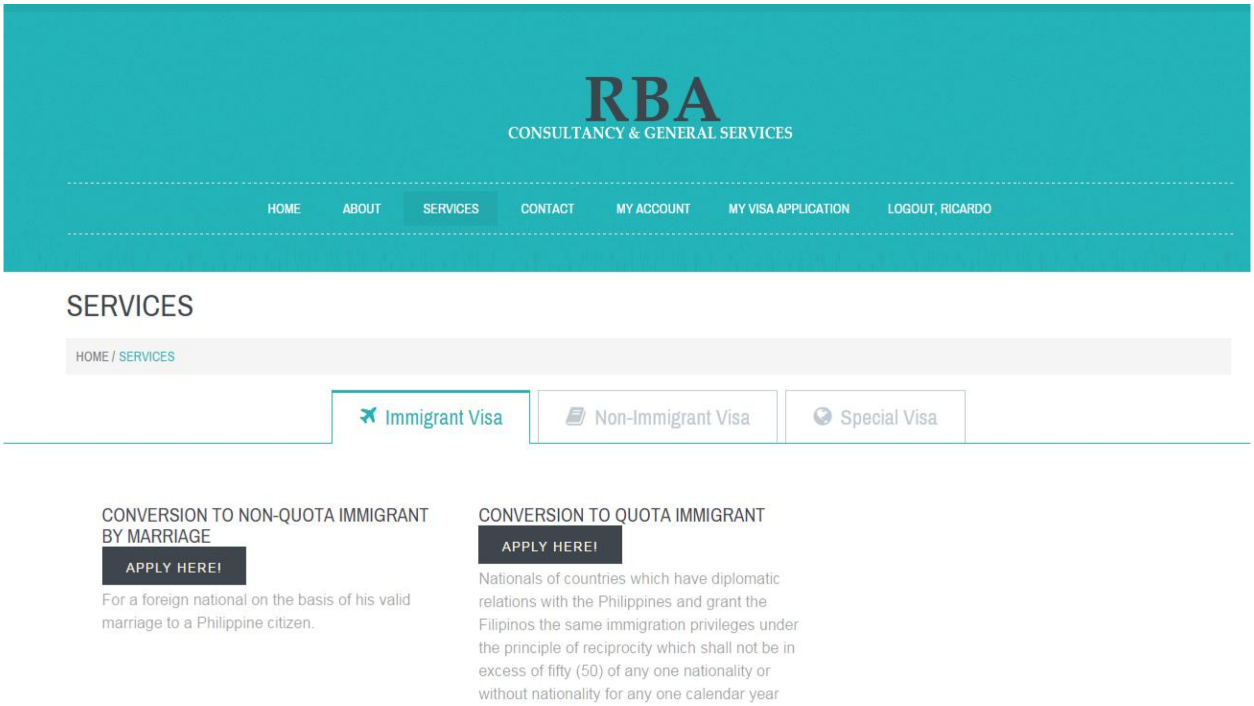


Figure 1.17 Services Page

- Step 3: Choose for services and Click Apply Button.

Figure 1.18 Apply Button

- Step 4: It will be redirected to General Instruction, after reading it Click the Apply Button Below the General Instruction.

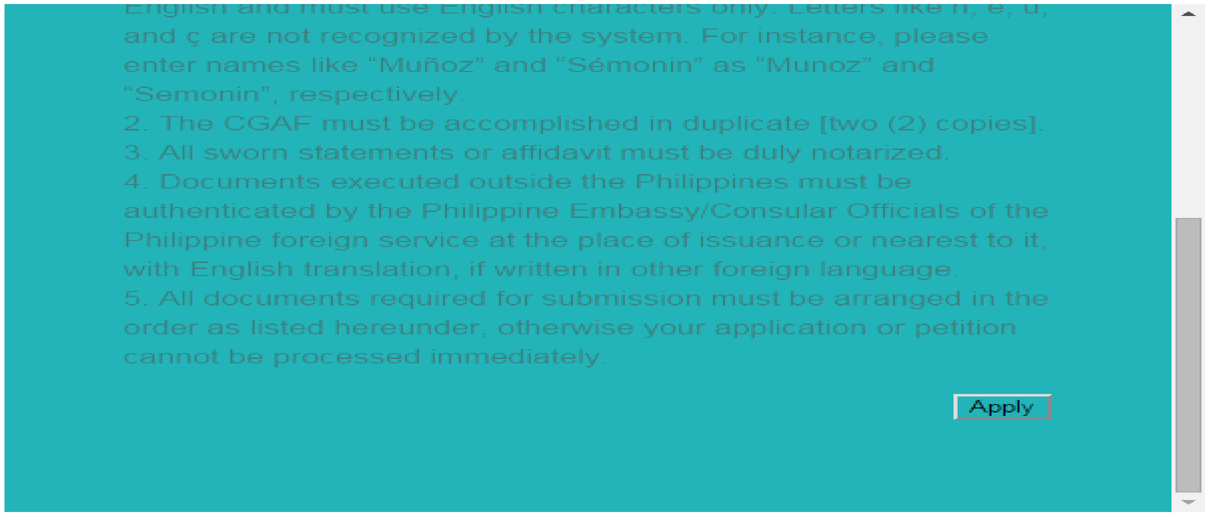


Figure 1.19 Services Page

- Step 5: Check the Visa Transaction Page to see that the services you applied has been added there.

7. Uploading Requirements

This section discusses the step or instruction needs to be followed by the users of the system to be able for them to upload requirements.

- Step 1: Go to Visa Transaction and click edit icon for each services you wanted to upload requirements.
- Step 2: Click edit icon for every requirements

- Step 3: It will be redirected to Upload Page, user need to upload their files here. After uploading, click Submit Button.

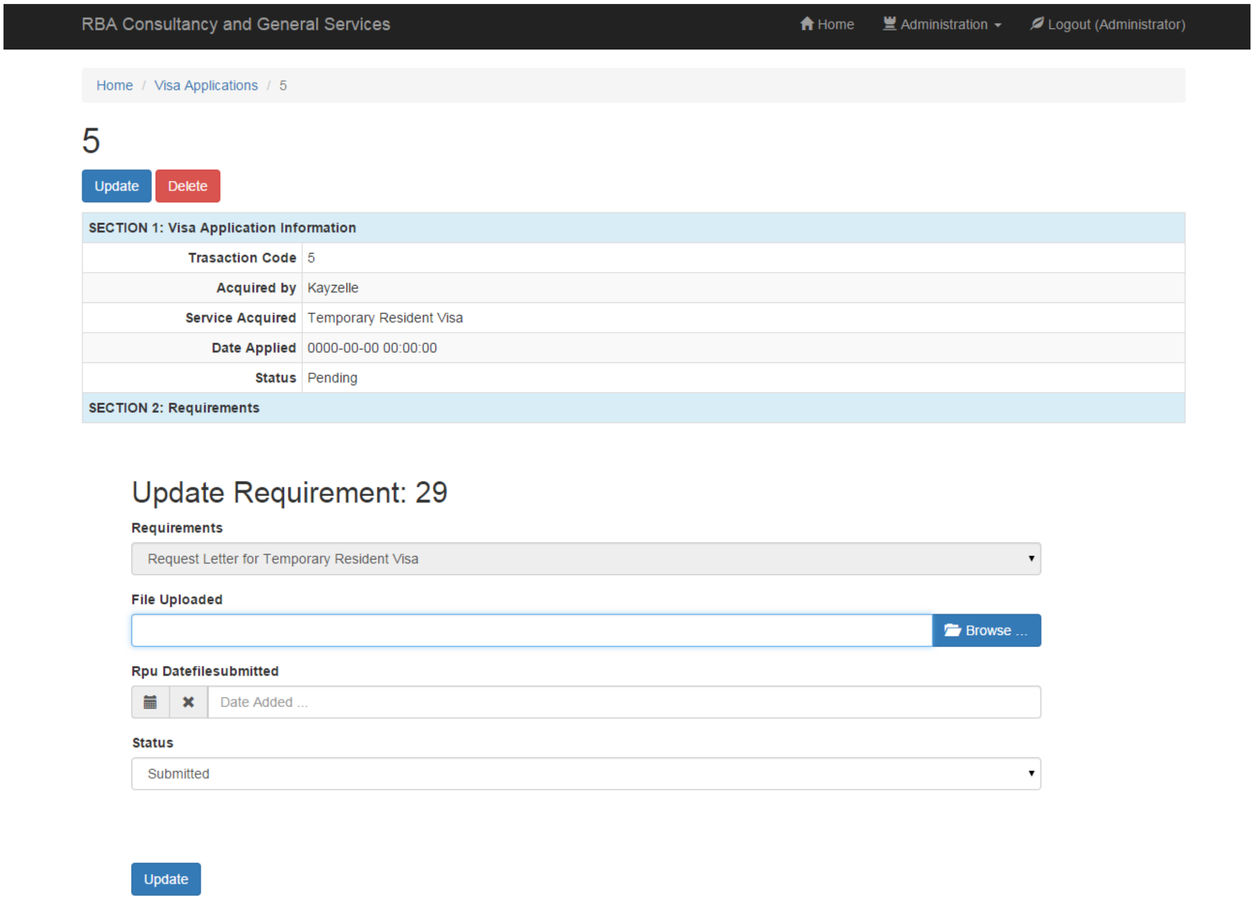


Figure 1.20 Upload Page

8. System Logout

- Step 1: Click the Logout Button in the navigation Bar.

Figure 1.21 Logout Button

Backend Functionalities

1. System Login

This section discusses the step or instruction needs to be followed by the Administrator of the system to be able for them to Logged in.

- Step 1: Filled out the Username and Password.

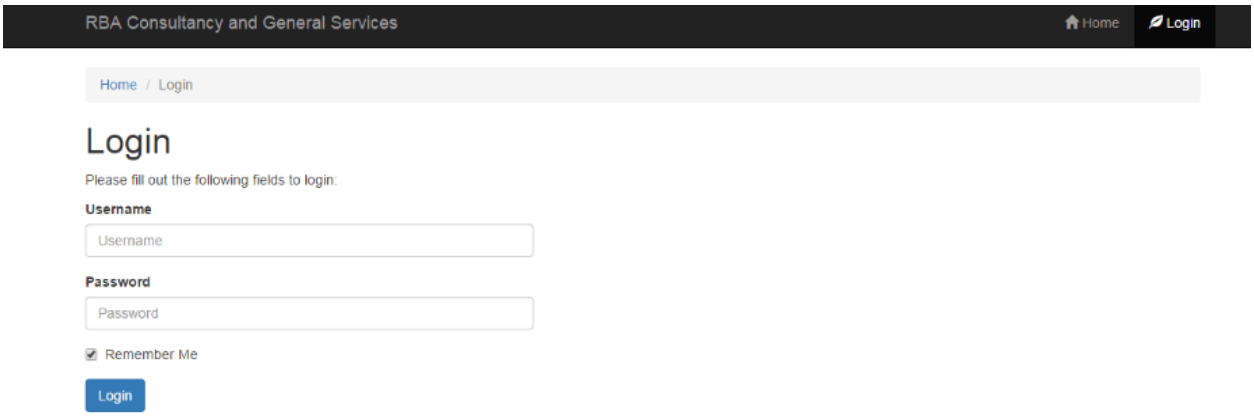


Figure 2.1 Login Page

- Step 2: Click the Login Button to access the Backend Website.

Figure 2.2 Login Button

- Step 3: Administrator would be redirected to Home Page.

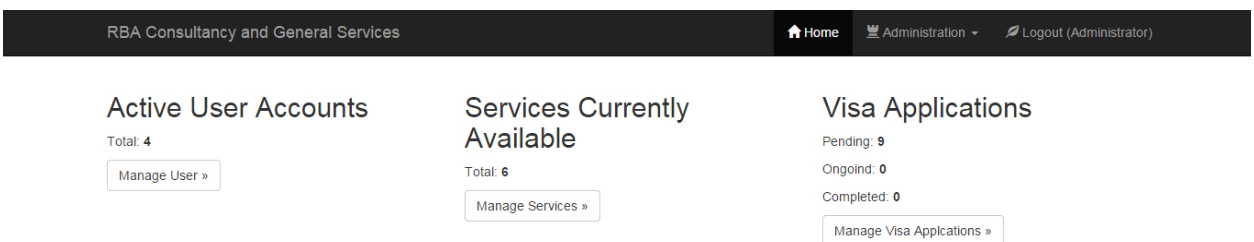


Figure 2.3 Backend Home Page

2. Add and Manage Client/User

This section discusses the step or instruction needs to be followed by the Administrator of the system to be able for them to Add and Managed their Clients.

- Step 1: On the Navigation Bar, Hover the Cursor to Administration Button and Choose User or simply click the Manage User Button in the Home Page.

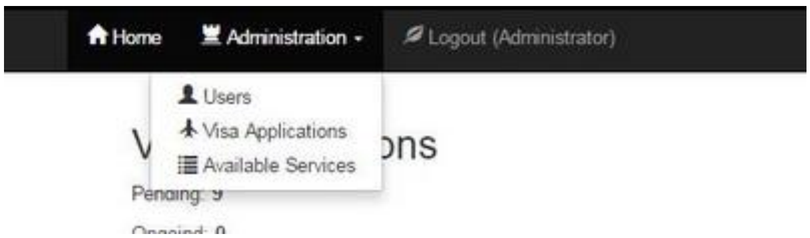


Figure 2.4 Administration Button

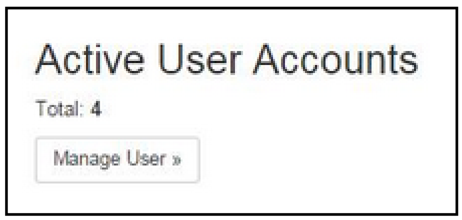


Figure 2.5 Manage User Button

- Step 2: Administrator would be redirected to User Page where all registered user of the system is enlisted there.

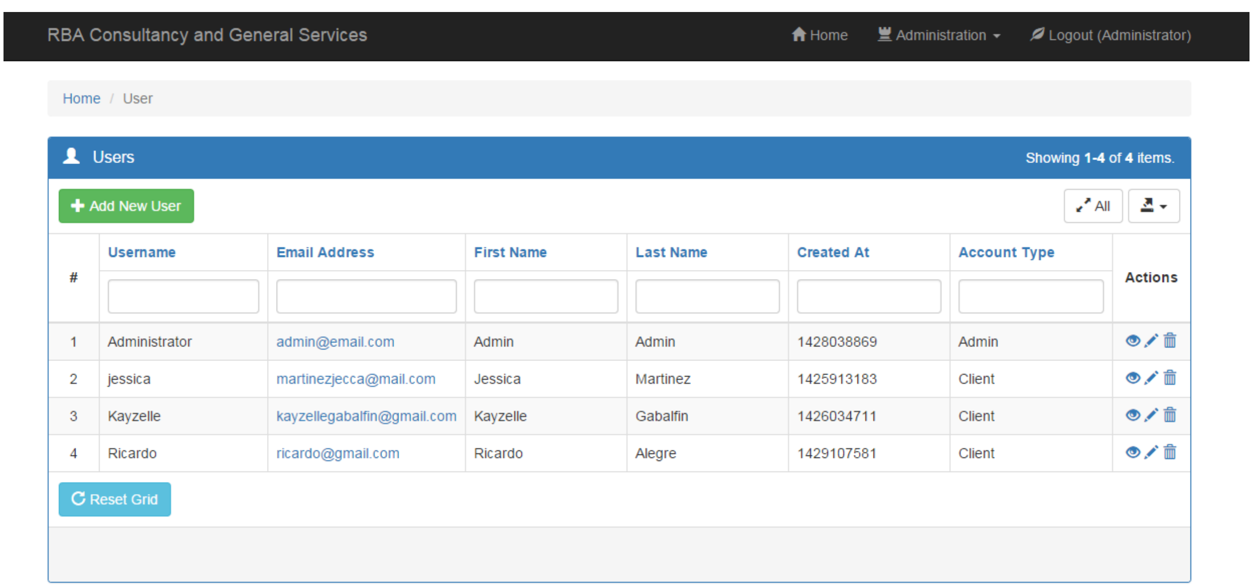


Figure 2.6 User Page

- Step 3: For adding User, Administrator needs to click the Add New User Button.

Figure 2.7 Add New User Button

- Step 4: Fill out the information field with their Clients information and Click Create button below the User Form.

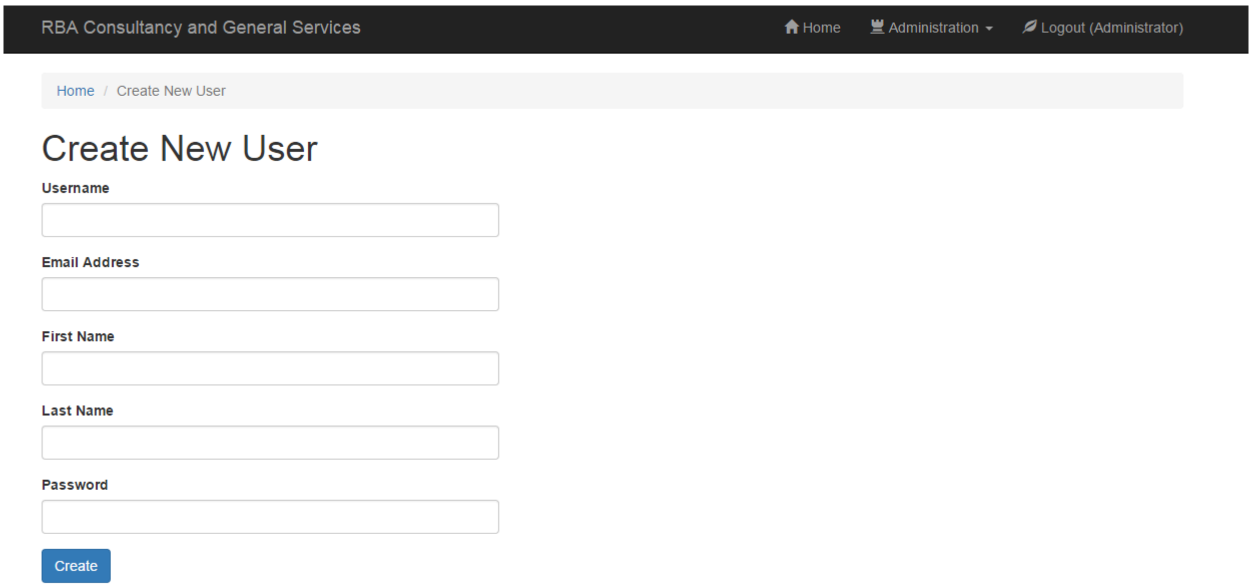


Figure 2.8 Create New User Page

- Step 4: For Editing User information Click  edit icon.

3. Add and Manage Visa Application acquired by their Clients

This section discusses the step or instruction needs to be followed by the Administrator of the system to be able for them to Add and Managed the Visa Application of their Client.

- Step 1: On the Navigation Bar, Hover the Cursor to Administration Button and Choose Visa Application or simply click the Manage Visa Application Button in the Home Page.

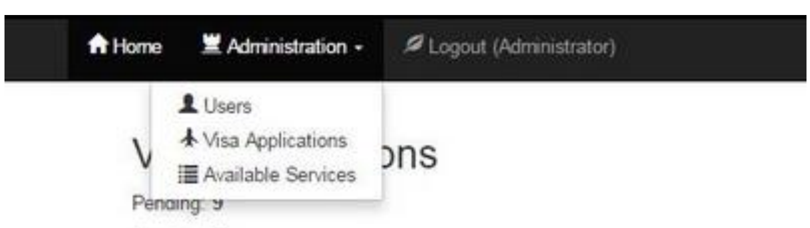


Figure 2.9 Administration Button

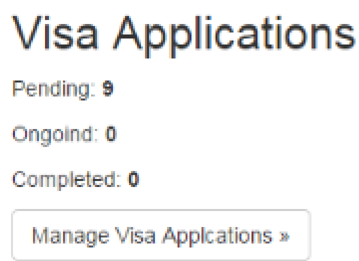


Figure 2.9 Manage Visa Application Button

- Step 2: Administrator would be redirected to Visa Application Page where all Visa Application acquired by their clients is enlisted there.

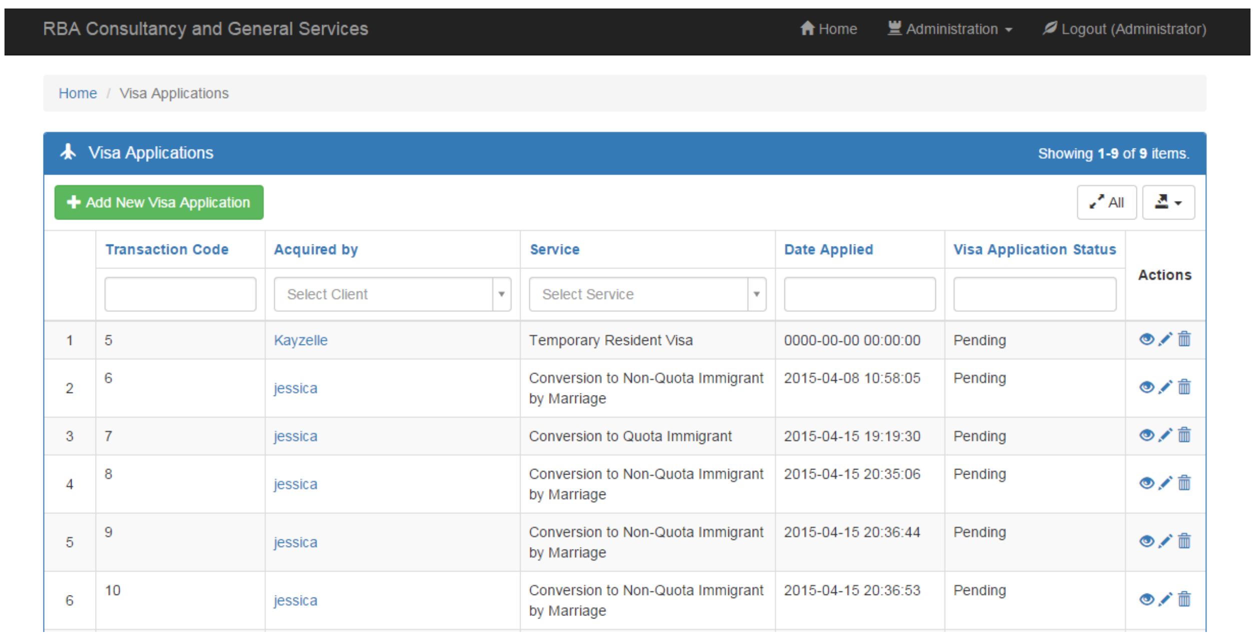


Figure 2.10 Visa Application Page

- Step 3: For adding Visa Application, Administrator needs to click the Add Visa Application Button.

Figure 2.10 Add New Visa Application Button

- Step 4: Fill out the information field with the Services acquired by their Client, after filling it out, click Create Button and the Visa Application is now saved in the database and can be viewed to the Visa Application Page.

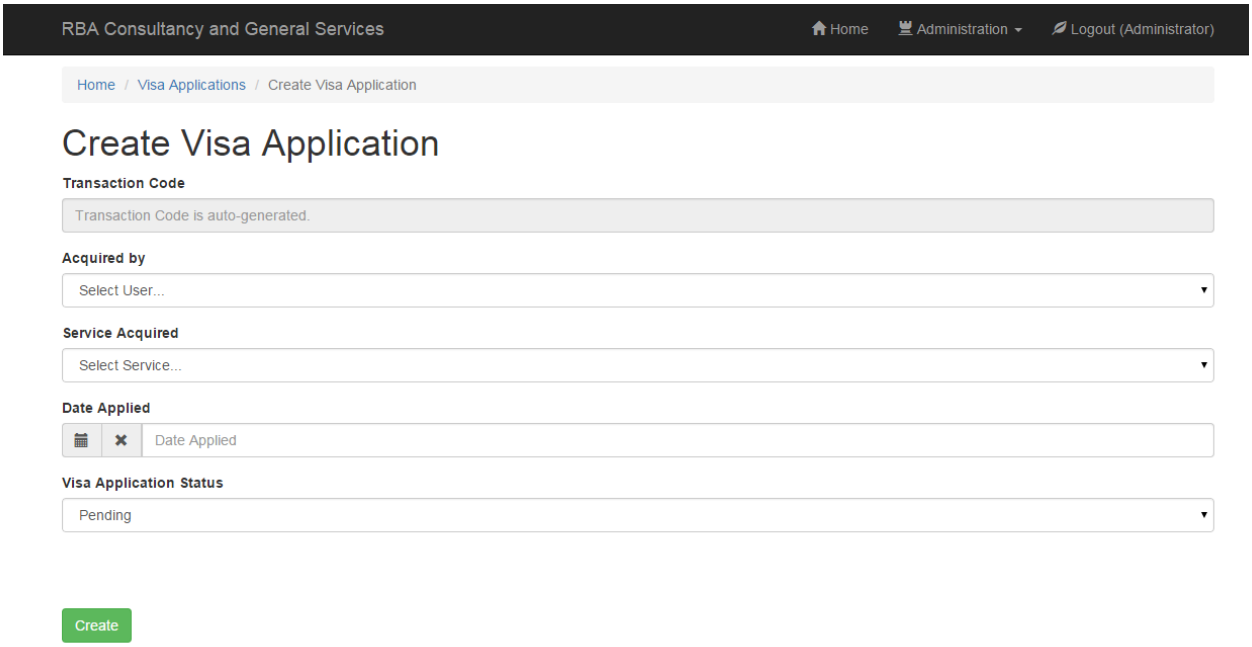


Figure 2.11 Create Visa Application Page

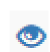
- Step 5: Change the Status of their Client, by  viewing the Client's application and update the Client's Application Status. Click first the  edit icon to redirect the Administrator to Edit Page.

Figure 2.12 Visa Application Status

4. Add and Managed the Service List

This section discusses the step or instruction needs to be followed by the Administrator of the system to be able for them to Add and Managed the Services they offered.

- Step 1: On the Navigation Bar, Hover the Cursor to Administration Button and Choose Available Services or simply click the Manage Service in the Home Page.

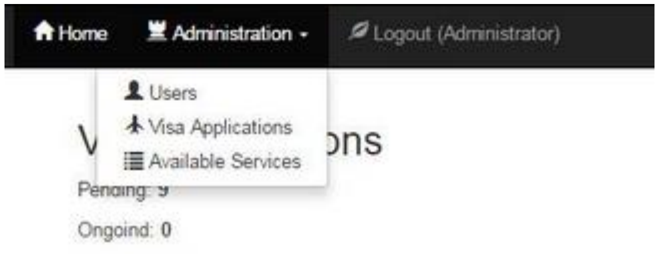


Figure 2.13 Administration Button

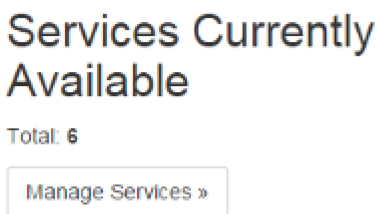


Figure 2.13 Manage Services button

- Step 2: Administrator would be redirected to Services Page

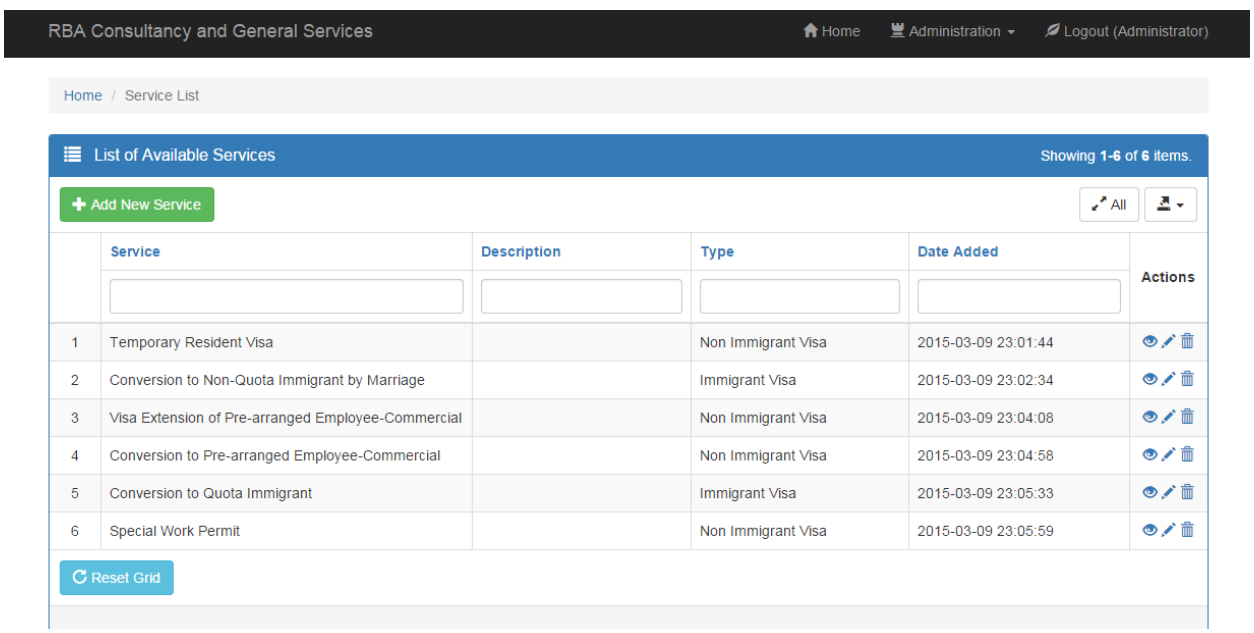


Figure 2.14 Service Page

- Step 3: For adding Visa Application, Administrator needs to click the Add Services Button.

Figure 2.15 Add New Service button

- Step 4: Fill out the information field with the Services Information, after filling it out, click Create Button and the New Services is now saved in the database and can be viewed to the Services Page and can already be acquired by clients.

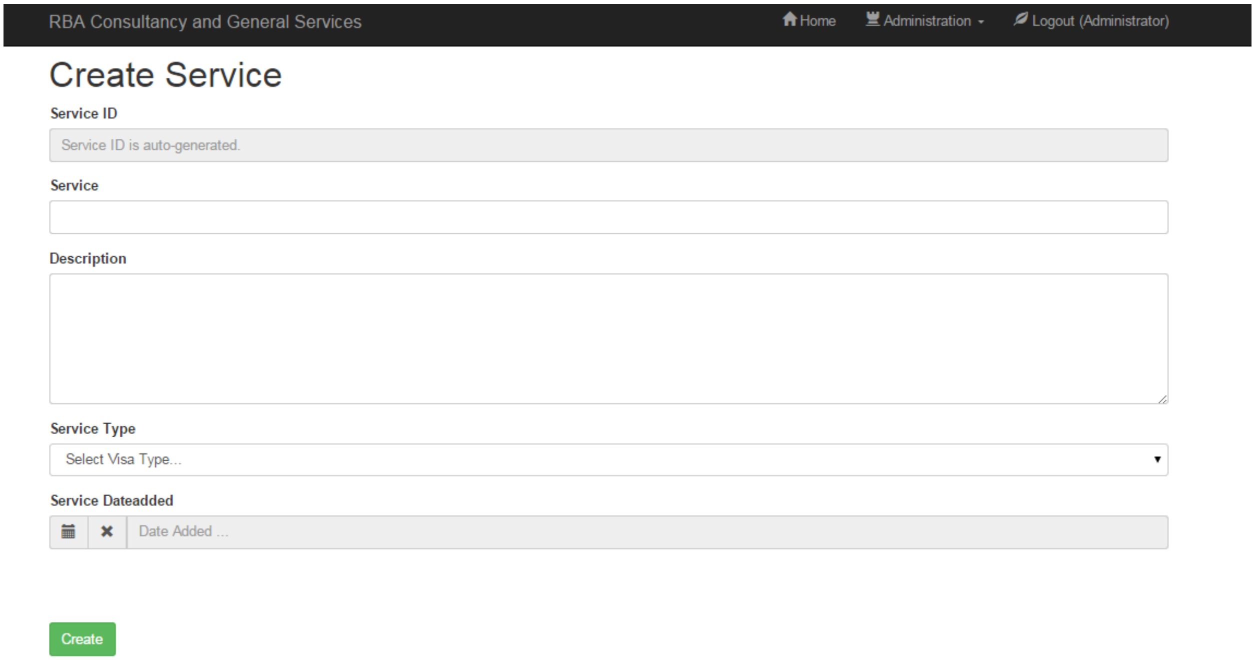
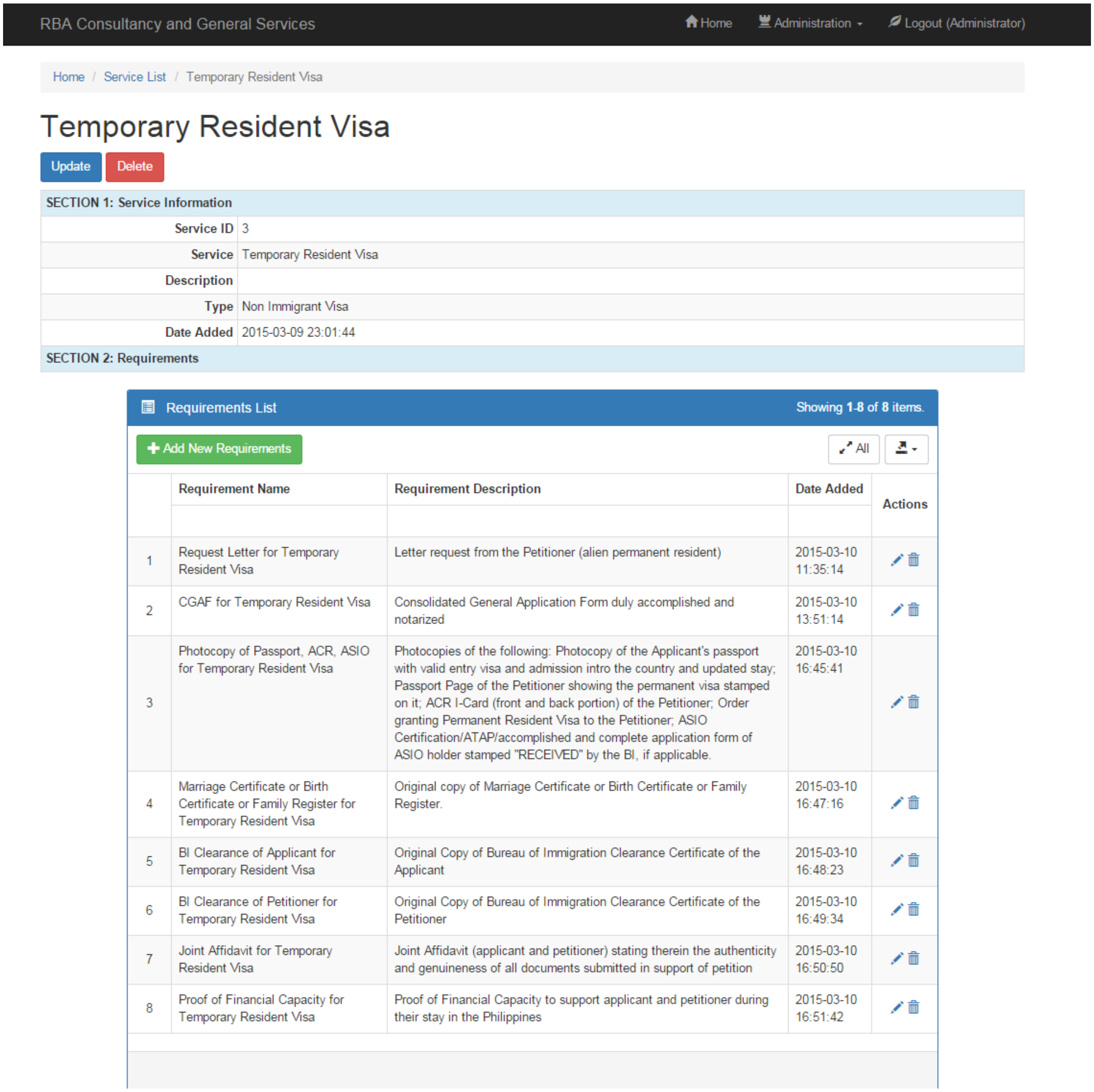


Figure 2.15 Create Service Page

- Step 5: To View the services and their requirements, Click view icon, to view the service information as well as its needed requirements. Administrator will be redirected to Service 1 Page.


RBA Consultancy and General Services   Home   Administration   Logout (Administrator)

Home / Service List / Temporary Resident Visa

Temporary Resident Visa

Update   Delete

SECTION 1: Service Information	
Service ID	3
Service	Temporary Resident Visa
Description	
Type	Non Immigrant Visa
Date Added	2015-03-09 23:01:44
SECTION 2: Requirements	

Requirements List   Showing 1-8 of 8 items.

Add New Requirements   All

	Requirement Name	Requirement Description	Date Added	Actions
1	Request Letter for Temporary Resident Visa	Letter request from the Petitioner (alien permanent resident)	2015-03-10 11:35:14	
2	CGAF for Temporary Resident Visa	Consolidated General Application Form duly accomplished and notarized	2015-03-10 13:51:14	
3	Photocopy of Passport, ACR, ASIO for Temporary Resident Visa	Photocopies of the following: Photocopy of the Applicant's passport with valid entry visa and admission intro the country and updated stay; Passport Page of the Petitioner showing the permanent visa stamped on it; ACR I-Card (front and back portion) of the Petitioner; Order granting Permanent Resident Visa to the Petitioner; ASIO Certification/ATAP/accomplished and complete application form of ASIO holder stamped "RECEIVED" by the BI, if applicable.	2015-03-10 16:45:41	
4	Marriage Certificate or Birth Certificate or Family Register for Temporary Resident Visa	Original copy of Marriage Certificate or Birth Certificate or Family Register.	2015-03-10 16:47:16	
5	BI Clearance of Applicant for Temporary Resident Visa	Original Copy of Bureau of Immigration Clearance Certificate of the Applicant	2015-03-10 16:48:23	
6	BI Clearance of Petitioner for Temporary Resident Visa	Original Copy of Bureau of Immigration Clearance Certificate of the Petitioner	2015-03-10 16:49:34	
7	Joint Affidavit for Temporary Resident Visa	Joint Affidavit (applicant and petitioner) stating therein the authenticity and genuineness of all documents submitted in support of petition	2015-03-10 16:50:50	
8	Proof of Financial Capacity for Temporary Resident Visa	Proof of Financial Capacity to support applicant and petitioner during their stay in the Philippines	2015-03-10 16:51:42	

Figure 2.16 View Service Information

- Step 6: To add new requirement for specific services, click Add Requirements Button.

Figure 2.17 Add new Requirements

- Step 7: Administrator will be redirected to Create Requirements Page, Administrator needs to fill out the information field for new services. After filling out, Click Create Button.

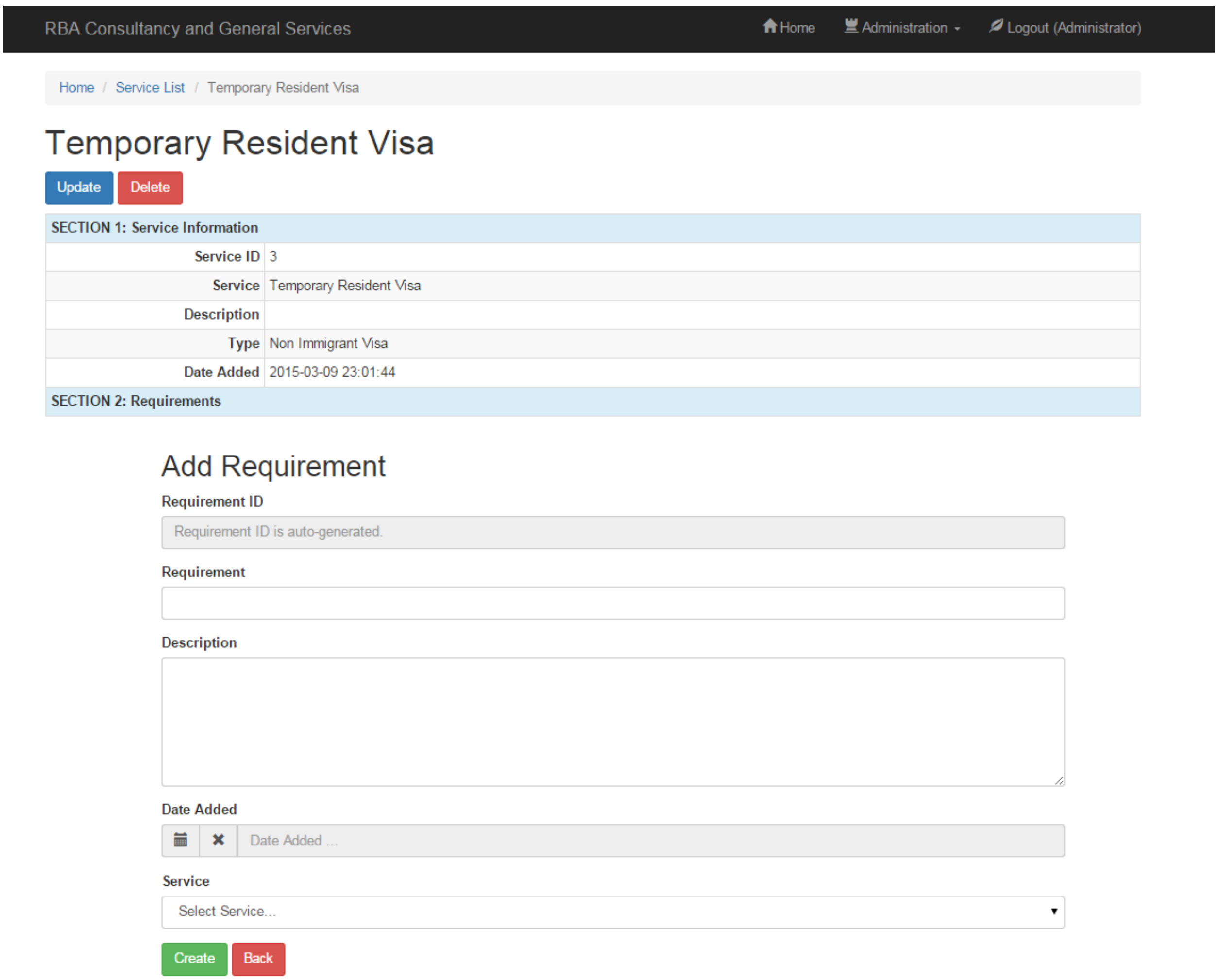


Figure 2.18 Create Service Page

- Step 8: For Editing Service information and Requirements Information, Click  edit icon.

5. System Logout

   - Step 1: Click Logout Button.