

# Login Set Up

Williams Lea Document Creation Application

## Please Log In

User ID:

Password:

Login



[Forgot password? Click here](#)

## Please Log In

User ID:

Please enter a valid user ID

Password:

Please enter a valid password

Login

[Forgot password? Click here](#)

## Please Log In

User ID or password you entered is incorrect

User ID:

someuserid

Password:

●●●●●●

Login

[Forgot password? Click here](#)

Initial password reset

Login Set Up

Temporary password assigned to you must be changed. Please type in a new password:

New password:

Confirm password:

Choose a memorable question

Answer:

Initial password reset

Login Set Up

Temporary password assigned to you must be changed. Please type in a new password.

• Password must be between 6-12 characters

• Must contain at least 1 number

New password:

Confirm password:

Confirm new password

Choose a memorable question

Select a question...▼

Answer:

Enter answer to memorable question

Cancel

Submit

Initial password reset

Login Set Up

Temporary password assigned to you must be changed. Please type in a new password:

New password:

●●●●●●

✓

Confirm password:

●●●●●●

✗

Passwords do not match

Choose a memorable question

Select a question...

▼

Answer:

Enter answer to memorable question

Cancel

Submit

Initial password reset

### Login Set Up

Temporary password assigned to you must be changed. Please type in a new password:

New password:

●●●●●●

✓

Confirm password:

●●●●●●

✓

Choose a memorable question

What is your mother's maiden name

▼

Answer:

Anderson

Cancel

Submit



Subsequent password reset

Password Reset (Step 1 of 2)

User ID:

someuserid

Question: Lorem ipsum dolor sit amet?

Answer:

Etiam lorem nisi,

Cancel

Submit

Password Reset (Step 1 of 2)

The answer you provided is incorrect.

User ID:

someuserid

Question: Lorem ipsum dolor sit amet?

Answer:

Etiam lorem nisi,

Cancel

Submit

# Password Reset (Step 2 of 2)

Temporary password assigned to you must be changed. Please type in a new password:

New password:

●●●●●●

✓

Confirm password:

●●●●●●

✓

Cancel

Submit



Password successfully changed.



Please Log In

User ID:

Password:

Login

[Forgot password? Click here](#)

# Change Password (Logged In)

Williams Lea Document Creation Application

My documents 5

- Create document
- Approvals
- Administration
- Training material

My Documents

 Search:

1-10 of 50 documents

Document name ▼	Created ▼	Updated ▼	Status ▼
Complaint letter <small>Addressee: John Smith</small>	Today at 14:45	Today at 14:45	Submitted to archive
Change payment <small>Addressee: Thomas Sterling</small>	Today at 10:22	Today at 10:22	Pending local print
Contact customer <small>Addressee: Thomas Sterling</small>	Yesterday at 09:34	Yesterday at 09:34	Pending approval
Accounts in arrears <small>Addressee: Thomas Sterling</small>	Yesterday at 11:50	Yesterday at 11:50	Pending approval
Additional product <small>Addressee: Thomas Sterling</small>	30 June at 12:05	30 June at 12:05	Pending approval
Cross selling <small>Addressee: Thomas Sterling</small>	30 June at 15:29	30 June at 15:29	Pending approval
Cross selling <small>Addressee: Thomas Sterling</small>	30 June at 15:44	30 June at 15:44	Submitted to print
Cross selling <small>Addressee: Thomas Sterling</small>	28 June at 10:17	28 June at 10:17	Pending approval
Cross selling <small>Addressee: Thomas Sterling</small>	27 June at 11:18	27 June at 11:18	Rejected
Cross selling <small>Addressee: Thomas Sterling</small>	26 June at 13:56	26 June at 13:56	Rejected

Change password

Log out

My documents 5

Create document

Approvals

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Training material

# My Documents

 Search:

1-10 of 50 documents

Document name ▼	Created ▼	Updated ▼	Status ▼
Complaint letter <small>Addressee: John Smith</small>	Today at 14:45	Today at 14:45	Submitted to archive
Change payment <small>Addressee: Thomas Sterling</small>	Today at 10:22	Today at 10:22	Pending local print
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Additional product <small>Addressee: Thomas Sterling</small>	30 June at 12:05	30 June at 12:05	Pending approval
Cross selling <small>Addressee: Thomas Sterling</small>	30 June at 15:29	30 June at 15:29	Pending approval
Cross selling <small>Addressee: Thomas Sterling</small>	30 June at 15:44	30 June at 15:44	Submitted to print
Cross selling <small>Addressee: Thomas Sterling</small>	28 June at 10:17	28 June at 10:17	Pending approval
Cross selling <small>Addressee: Thomas Sterling</small>	27 June at 11:18	27 June at 11:18	Rejected
Cross selling <small>Addressee: Thomas Sterling</small>	26 June at 13:56	26 June at 13:56	Rejected

My documents

5

Templates

Approvals

Administration

Training material

Documents

▼

Search:

Search

1-10 of 50 documents

Document name		Status ▼	
Complaint letter	Addresssee: John Smith	Draft	
Change payment	Addresssee: Thomas St	Pending local print	
Contact customer	Addresssee: Thomas St	Pending approval	
Accounts in arrears	Addresssee: Thomas St	Pending batch print	
Additional product	Addresssee: Thomas St	Approved	
Cross selling	Addresssee: Thomas Sterling	Approved	
Cross selling	Addresssee: Thomas Sterling	30 June at 15:44	Approved
Cross selling	Addresssee: Thomas Sterling	28 June at 10:17	Approved
Cross selling	Addresssee: Thomas Sterling	27 June at 11:18	Rejected
Cross selling	Addresssee: Thomas Sterling	26 June at 13:56	Rejected

Change Password



Current/Old password:

Enter your password

New password:

Enter new password

Confirm password:

Confirm new password

Cancel

Save

<<

1

2

3

4

5

>>



My documents

5

- Templates
- Approvals
- Administration
- Training material

Documents

▼

Search:

1-10 of 50 documents

Document name		Status ▼
Complaint letter		Draft
Addressee: John Smith		
Change payment		Pending local print
Addressee: Thomas St		
Contact customer		Pending approval
Addressee: Thomas St		
Accounts in arrears		Pending batch print
Addressee: Thomas St		
Additional product		Approved
Addressee: Thomas St		
Cross selling		Approved
Addressee: Thomas Sterling		
Cross selling	30 June at 15:44	Approved
Addressee: Thomas Sterling		
Cross selling	28 June at 10:17	Approved
Addressee: Thomas Sterling		
Cross selling	27 June at 11:18	Rejected
Addressee: Thomas Sterling		
Cross selling	26 June at 13:56	Rejected
Addressee: Thomas Sterling		

Change Password

×

Current/Old password:

●●●●●●

New password:

●●●●●●

✓

Confirm password:

●●●●●●

×

Passwords do not match

Cancel

Save

My documents

5

- Templates
- Approvals
- Administration
- Training material

Documents

▼

Search:

Search

1-10 of 50 documents

Document name		Status ▼
Complaint letter		Draft
Change payment		Pending local print
Contact customer		Pending approval
Accounts in arrears		Pending batch print
Additional product		Approved
Cross selling		Approved
Cross selling	30 June at 15:44	Approved
Cross selling	28 June at 10:17	Approved
Cross selling	27 June at 11:18	Rejected
Cross selling	26 June at 13:56	Rejected

Change Password

×

Current/Old password:

●●●●●●

New password:

●●●●●●

✓

Confirm password:

●●●●●●

✓

Cancel

Save

My documents

5

Create document

Approvals

Administration

Training material

Password successfully changed.

×

# My Documents

▼

Search:

Search by document name

Search

1-10 of 50 documents

Document name ▼	Created ▼	Updated ▼	Status ▼
Complaint letter Addressee: John Smith	Today at 14:45	Today at 14:45	Submitted to archive
Change payment Addressee: Thomas Sterling	Today at 10:22	Today at 10:22	Pending local print
Contact customer Addressee: Thomas Sterling	Yesterday at 09:34	Yesterday at 09:34	Pending approval
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Cross selling Addressee: Thomas Sterling	26 June at 13:56	26 June at 13:56	Rejected

My documents

5

Create document

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Training material

## Create Document

Select a template to create a document.

▼

Search:

Search by template name or ID

Search

1-10 of 50 templates

Template name ▼	Department	Template ID ▼	Recently used ▼
Complaint letter <small>v1.4</small> Lorem ipsum dolor sit, consectetur adipiscing elit...	Mortgage Collections	CID102345	Today at 14:45
Change payment <small>v1.4</small> Lorem ipsum dolor sit, consectetur adipiscing elit...	Mortgage Collections	CID94848	Today at 10:22
Contact customer <small>v2</small> Lorem ipsum dolor sit, consectetur adipiscing elit...	Marketing & Sales	CID43885	Yesterday at 8:12
Accounts in arrears <small>v1</small> Lorem ipsum dolor sit, consectetur adipiscing elit...	Marketing & Sales	CID12444	30 Jun at 11:06
Complaint letter <small>v1.8</small> Lorem ipsum dolor sit, consectetur adipiscing elit...	Marketing & Sales	CID102345	30 Jun at 11:06
Change payment <small>v2</small> Lorem ipsum dolor sit, consectetur adipiscing elit...	Marketing & Sales	CID94848	28 Jun at 11:06
Contact customer <small>v2</small> Lorem ipsum dolor sit, consectetur adipiscing elit...	Marketing & Sales	CID43885	26 Jun at 11:06
Accounts in arrears <small>v2</small> Lorem ipsum dolor sit, consectetur adipiscing elit...	Human Resources	CID12444	26 Jun at 11:06
Contact customer <small>v2</small> Lorem ipsum dolor sit, consectetur adipiscing elit...	Human Resources	CID43885	22 Jun at 11:06
Accounts in arrears <small>v2</small> Lorem ipsum dolor sit, consectetur adipiscing elit...	Human Resources	CID12444	21 Jun at 11:06

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## Create Document

Select a template to create a document.

▼

Search:

Search by template name or ID

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1-10 of 50 templates

Template name ▼	Department	Template ID ▼	Recently used ▼
Complaint letter <div>v1.4</div> <div> Lorem ipsum dolor sit, consectetur adipiscing elit...</div>	Mortgage Collections	CID102345	Today at 14:45
Change payment <div>v1.4</div> <div> Lorem ipsum dolor sit, consectetur adipiscing elit...</div>	Marketing & Sales	CID94848	Today at 10:22
Contact customer <div>v2</div> <div> Lorem ipsum dolor sit, consectetur adipiscing elit...</div>	Marketing & Sales	CID43885	Yesterday at 8:12
Accounts in arrears <div>v1</div> <div> Lorem ipsum dolor sit, consectetur adipiscing elit...</div>	Marketing & Sales	CID12444	30 Jun at 11:06
Complaint letter <div>v1.8</div> <div> Lorem ipsum dolor sit, consectetur adipiscing elit...</div>	Marketing & Sales	CID102345	30 Jun at 11:06
Change payment <div>v2</div> <div> Lorem ipsum dolor sit, consectetur adipiscing elit...</div>	Marketing & Sales	CID94848	28 Jun at 11:06
Contact customer <div>v2</div> <div> Lorem ipsum dolor sit, consectetur adipiscing elit...</div>	Marketing & Sales	CID43885	26 Jun at 11:06
Accounts in arrears <div>v2</div> <div> Lorem ipsum dolor sit, consectetur adipiscing elit...</div>	Human Resources	CID12444	26 Jun at 11:06
Contact customer <div>v2</div> <div> Lorem ipsum dolor sit, consectetur adipiscing elit...</div>	Human Resources	CID43885	22 Jun at 11:06
Accounts in arrears <div>v2</div> <div> Lorem ipsum dolor sit, consectetur adipiscing elit...</div>	Human Resources	CID12444	21 Jun at 11:06

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Cras posuere justo et accumsan suscipit. Integer rutrum fermentum urna egestas sodales. Ut laoreet metus non purus tristique, eget euismod orci facilisis. Sed malesuada neque molestie, consequat purus eu, viverra ipsum.

- My documents

5
- Create document
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Select a template to create a document.

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Complaint letter <small>v1.4</small> sit, consectetur adipiscing elit...	Mortgage Collections	CID102345	Today at 14:45
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Accounts in arrears <small>v2</small> Lorem ipsum dolor sit, consectetur adipiscing elit...	Human Resources	CID12444	26 Jun at 11:06
Contact customer <small>v2</small> Lorem ipsum dolor sit, consectetur adipiscing elit...	Human Resources	CID43885	22 Jun at 11:06
Accounts in arrears <small>v2</small> Lorem ipsum dolor sit, consectetur adipiscing elit...	Human Resources	CID12444	21 Jun at 11:06

## Create Document



### Complaint letter

Department: Mortgage Collections

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Morbi quis mi elementum, feugiat quam id, congue nibh.

Brand:

☒ Clydesdale Bank

☐ Yorkshire Bank

First name:

Last name:

User ID:

0001\

Address 1:

Address 2 (optional):

County:

Country:

Cancel

Create Document

# Create Document



## Complaint letter

Department: Mortgage Collections

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Morbi quis mi elementum, feugiat quam id, congue nibh.

Brand:

☒ Clydesdale Bank

☐ Yorkshire Bank

Tooltip should appear on focus into the empty field and disappear when user starts typing.

If there is an existing value and the user clicks in it, then don't show tooltip

First name:

Alphabetical values and spaces are allowed

Last name:

Enter last name

User ID:

0001\ Enter a number

Address 1:

Enter an address

Address 2 (optional):

Enter an address

County:

Country:

Cancel

Create Document

### Text for tooltips:

First name, last name:

Alphabet or spaces are allowed

Address1 and Address 2:

Alpha-numerical values and spaces are allowed

Post code:

Alpha-numerical values and spaces are allowed



## Create Document



### Complaint letter

Department: Mortgage Collections

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Morbi quis mi elementum, feugiat quam id, congue nibh.

Brand:

☒ Clydesdale Bank

☐ Yorkshire Bank

First name:

John

Last name:

Smith

User ID:

0001\ 0123456

Address 1:

Flat 20

Address 2 (optional):

1234 Kingsland Road

County:

Country:

Cancel

Create Document

## Create Document



Lorem ipsum dolor sit amet, consectetur adipiscing elit. Morbi quis mi elementum, feugiat quam id, congue nibh.

Brand:

- ☒ Clydesdale Bank  
☐ Yorkshire Bank

First name:

John

Last name:

Smith

User ID:

0001\ 0123456

Address 1:

Flat 20

Address 2 (optional):

1234 Kingsland Road

County:

Greater London ▼

Country:

United Kingdom ▼

Post code:

Cancel

Create Document



## Create Document



Brand:

- ☒ Clydesdale Bank  
☐ Yorkshire Bank

First name:

&^%%\$

Please enter a valid first name

Last name:

\*&&^%

Please enter a valid last name

User ID:

0001\ &\*^%\$#

Please enter a valid user ID

Address 1:

&^%%\$

Please enter a valid address

Address 2 (optional):

&^%%\$

Please enter a valid address

County:

Greater London ▼

Country:

United Kingdom ▼

Cancel

Create Document



## Create Document



First name:

&^%%\$

Please enter a valid first name

Last name:

\*&&^%

Please enter a valid last name

User ID:

0001\ &\*^%\$#

Please enter a valid user ID

Address 1:

&^%%\$

Please enter a valid address

Address 2 (optional):

&^%%\$

Please enter a valid address

County:

Greater London ▼

Country:

United Kingdom ▼

Post code:

&^%%\$

Please enter a valid post code

Cancel

Create Document





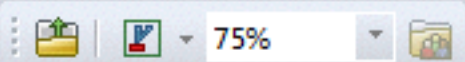
Please wait while document is being created. This may take a few seconds.

# User selectable approval and local print

Williams Lea Document Creation Application



File View



L

1 2 3 4 5 6 7 8 9 10 11

Outline Viewer



Customers

- 10 Arra
- Flow\_p

☐ Submit for approval ☐ Submit for local print

Submit

Cancel



MR. WILLIAMS LEA  
1ST FLOOR,500 CAPABILITY GREEN  
LUTON  
LU1 3LS  
XXXX  
UK

Yorkshire Bank Home Loans  
1st Floor, 20 Merion Way  
Leeds  
LS2 8NZ

Telephone: 0844 6933 273 option 1  
Fax: (0113) 807 9482  
E-Mail:  
national@national-collections.co.uk

Dear MR. WILLIAMS LEA,

MORTGAGE ACCOUNT NO: 11128888452  
REGULAR PAYMENT: £1000.00  
ARREARS: £234.00

Thank you for contacting us regarding the arrears on your mortgage account and giving us the opportunity to discuss your current situation. It is vital that we are kept informed of any change in your circumstances in order that we may assist you as much as possible.

As discussed, we are prepared to set up a temporary payment arrangement with you and accept payments of **£234.00** for the next **\*\*\*** month. The first payment is due by **\*\*\*** and on the same date monthly thereafter.

Once this arrangement has expired, we will expect full payment of the arrears and a return to the payment of the full monthly installments. (Delete if not appropriate)

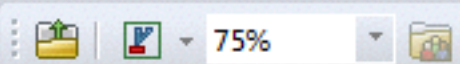
The agreed amount is less than your current contractual mortgage payment and therefore arrears and additional interest will continue to accrue on the account each month. You should be aware that this may mean that your mortgage may not be repaid within the term you originally requested and as set out in your Mortgage offer.

\*\*\*\*\*remove if requested on letter template\*\*\*\*\*

Please note that the amount stated above does not include any additional Step Up amount or Voluntary Overpayment that you may have previously agreed to pay and reflects only the contractual installment values.



File View



L

1 2 3 4 5 6 7 8 9 10 11

Outline Viewer



1 of 2

Customers

10 Arra  
Flow\_p☐ Submit for approval ☒ Submit for local print

Submit

Cancel



MR. WILLIAMS LEA  
1ST FLOOR,500 CAPABILITY GREEN  
LUTON  
LU1 3LS  
XXXX  
UK

Yorkshire Bank Home Loans  
1st Floor, 20 Merion Way  
Leeds  
LS2 8NZ

Telephone: 0844 6933 273 option 1  
Fax: (0113) 807 9482  
E-Mail:  
national@national-collections.co.uk

Dear MR. WILLIAMS LEA,

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As discussed, we are prepared to set up a temporary payment arrangement with you and accept payments of **£234.00** for the next **\*\*\*** month. The first payment is due by **\*\*\*** and on the same date monthly thereafter.

Once this arrangement has expired, we will expect full payment of the arrears and a return to the payment of the full monthly installments. (Delete if not appropriate)

The agreed amount is less than your current contractual mortgage payment and therefore arrears and additional interest will continue to accrue on the account each month. You should be aware that this may mean that your mortgage may not be repaid within the term you originally requested and as set out in your Mortgage offer.

\*\*\*\*\*remove if requested on letter template \*\*\*\*\*

Please note that the amount stated above does not include any additional Step Up amount or Voluntary Overpayment that you may have previously agreed to pay and reflects only the contractual installment values.



File View

75%



L

Outline Viewer

1 of 2

Customers

- 10 Arra
- Flow\_p

☐ Submit for approval
 ☒ Submit for local print

Print

Close



# Document Locked preventing Edit

MR. WILLIAMS LEA  
1ST FLOOR, 500 CAPABILITY GREEN  
LUTON  
LU1 3LS

Yorkshire Bank Home Loans  
1st Floor, 20 Merrion Way  
Luton  
LU1 3LS

Telephone: 0844 6933 273 option 1  
Fax: (0113) 807 9482  
E-Mail:  
national@national-collections.co.uk

Dear MR. WILLIAMS LEA,

MORTGAGE ACCOUNT NO: 11128888452  
REGULAR PAYMENT: £1000.00  
ARREARS: £234.00

Thank you for contacting us regarding the arrears on your mortgage account and giving us the opportunity to discuss your current situation. It is vital that we are kept informed of any change in your circumstances in order that we may assist you as much as possible.

As discussed, we are prepared to set up a temporary payment arrangement with you and accept payments of £234.00 for the next 12 months. The first payment is due by 1st and on the same date monthly thereafter.

Once this arrangement has expired, we will expect full payment of the arrears and a return to the payment of the full monthly installments. (Delete if not appropriate)

The agreed amount is less than your current contractual mortgage payment and therefore arrears and additional interest will continue to accrue on the account each month. You should be aware that this may mean that your mortgage may not be repaid within the term you originally requested and as set out in your Mortgage offer.

\*\*\*\*\*remove if requested on letter template \*\*\*\*\*

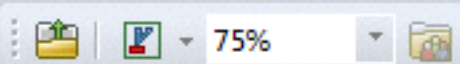
Please note that the amount stated above does not include any additional Step Up amount or Voluntary Overpayment that you may have previously agreed to pay and reflects only the contractual installment

Must be approved, no  
local print

Williams Lea Document Creation Application



File View



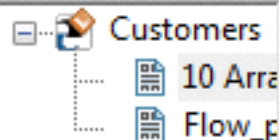
L

1 2 3 4 5 6 7 8 9 10 11

Outline Viewer



1 of 2

☒ Submit for approval ☐ Submit for local print

Submit

Cancel



MR. WILLIAMS LEA  
1ST FLOOR,500 CAPABILITY GREEN  
LUTON  
LU1 3LS  
XXXX  
UK

Yorkshire Bank Home Loans  
1st Floor, 20 Merion Way  
Leeds  
LS2 8NZ

Telephone: 0844 6933 273 option 1  
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\*\*\*\*\*remove if requested on letter template \*\*\*\*\*

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# Documents - Creation - Search

Williams Lea Document Creation Application

My documents

5

Create document

◀

Approvals

Administration

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# Create Document

Select a template to create a document.

🔍

Search: Accounts are overdue

✕

Search

0 templates found for “**Accounts are overdue**”

Template name ▼	Department	Template ID ▼	Recently used ▼
No results returned for this search			



# Documents - List

Williams Lea Document Creation Application

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# My Documents

▼

Search:

Search by document name

Search

1-10 of 50 documents

↺

🗑

Document name ▼	Created ▼	Updated ▼	Status ▼
<input checked="" type="checkbox"/> <b>Complaint letter</b> Addressee: John Smith	Today at 14:45	Today at 14:45	Rejected
<input checked="" type="checkbox"/> <b>Change payment</b> Addressee: Thomas Sterling	Today at 10:22	Today at 10:22	Pending local print
<input type="checkbox"/> <b>Contact customer</b> Addressee: Thomas Sterling	Yesterday at 09:34	Yesterday at 09:34	Pending approval
<input type="checkbox"/> <b>Accounts in arrears</b> Addressee: Thomas Sterling	Yesterday at 11:50	Yesterday at 11:50	Submitted to print
<input type="checkbox"/> <b>Additional product</b> Addressee: Thomas Sterling	30 June at 12:05	30 June at 12:05	Rejected
<input type="checkbox"/> <b>Cross selling</b> Addressee: Thomas Sterling	30 June at 15:29	30 June at 15:29	Rejected
<input type="checkbox"/> <b>Cross selling</b> Addressee: Thomas Sterling	30 June at 15:44	30 June at 15:44	Pending local print
<input type="checkbox"/> <b>Cross selling</b> Addressee: Thomas Sterling	28 June at 10:17	28 June at 10:17	Submitted to archive
<input type="checkbox"/> <b>Cross selling</b> Addressee: Thomas Sterling	27 June at 11:18	27 June at 11:18	Rejected
<input type="checkbox"/> <b>Cross selling</b> Addressee: Thomas Sterling	26 June at 13:56	26 June at 13:56	Rejected

My documents 2

Create document

Approvals 5

Administration

Training material

# My Documents

 Search:

Filters

[Clear all](#)

Status

☐ Pending approval (10)

☒ Rejected (8)

☐ Pending local print (4)

☐ Submitted to print (5)

☐ Submitted to archive (1)

	Created ▼	Updated ▼	Status ▼
<div><input checked="" type="checkbox"/> Accounts in arrears Addressee: Thomas Sterling</div>	Today at 14:45	Today at 14:45	<div>Rejected</div>
<div><input type="checkbox"/> Additional product Addressee: Thomas Sterling</div>	Today at 10:22	Today at 10:22	<div>Pending local print</div>
<div><input type="checkbox"/> Cross selling Addressee: Thomas Sterling</div>	Yesterday at 09:34	Yesterday at 09:34	<div>Pending approval</div>
<div><input type="checkbox"/> Cross selling Addressee: Thomas Sterling</div>	Yesterday at 11:50	Yesterday at 11:50	<div>Submitted to print</div>
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<div><input type="checkbox"/> Cross selling Addressee: Thomas Sterling</div>	28 June at 10:17	28 June at 10:17	<div>Submitted to archive</div>
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My documents

2

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# My Documents



Search:

Search by document name

Search

1-4 of 4 documents



Document name ▼	Created ▼	Updated ▼	Status ▼
<div><input type="checkbox"/></div> <div>Additional product</div> <div>Addressee: Thomas Sterling</div>	30 June at 12:05	Today at 14:45	Rejected
<div><input type="checkbox"/></div> <div>Cross selling</div> <div>Addressee: Thomas Sterling</div>	30 June at 15:29	Today at 10:22	Rejected
<div><input type="checkbox"/></div> <div>Cross selling</div> <div>Addressee: Thomas Sterling</div>	30 June at 15:44	Yesterday at 09:34	Rejected
<div><input type="checkbox"/></div> <div>Cross selling</div> <div>Addressee: Thomas Sterling</div>	28 June at 10:17	Yesterday at 09:34	Rejected

## Delete Document



You are about to delete **Complaint letter** (addressee **Thomas Sterling**).

Are you sure you want to continue?

Cancel

Yes, delete



My documents

Create document

Approvals

5

Administration

Training material

Complaint letter successfully deleted

×

My Documents

Search:

Search by document name

Search

1-10 of 50 documents

↺

Document name ▼	Created ▼	Updated ▼	Status ▼
<div><input type="checkbox"/></div> <div>Complaint letter</div> <div>Addressee: John Smith</div>	Today at 14:45	Today at 14:45	Rejected
<div><input type="checkbox"/></div> <div>Change payment</div> <div>Addressee: Thomas Sterling</div>	Today at 10:22	Today at 10:22	Pending local print
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<div><input type="checkbox"/></div> <div>Cross selling</div> <div>Addressee: Thomas Sterling</div>	26 June at 13:56	26 June at 13:56	Rejected

# Select a rejected document for edit

Williams Lea Document Creation Application

My documents

2

Create document

Approvals

5

Administration

Training material

# My Documents

▼

Search:

Search by document name

Search

1-10 of 50 documents



Document name ▼	Created ▼	Updated ▼	Status ▼
<div><input type="checkbox"/></div> <div>Complaint letter</div> <div>Addressee: John Smith</div>	Today at 14:45	Today at 14:45	Rejected
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<div><input type="checkbox"/></div> <div>Cross selling</div> <div>Addressee: Thomas Sterling</div>	26 June at 13:56	26 June at 13:56	Rejected



File View

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1 2 3 4 5 6 7 8 9 10 11

Outline Viewer

1 of 2

 Customers  
10 Arra  
Flow\_p☒ Submit for approval ☐ Submit for local print

Edit

Close



Document Locked preventing Edit

MR. WILLIAMS LEA  
1ST FLOOR,500 CAPABILITY GREEN  
LUTON  
LU1 3LS  
XXXX  
UKYorkshire Bank Home Loans  
1st Floor, 20 Merion Way  
Leeds  
LS2 8NDTelephone: 0844 6933 273 option 1  
Fax: (0113) 807 9482  
E-Mail:  
national@national-collections.co.uk

Dear MR. WILLIAMS LEA,

MORTGAGE ACCOUNT NO: 11128888452  
REGULAR PAYMENT: £1000.00  
ARREARS: £234.00

Thank you for contacting us regarding the arrears on your mortgage account and giving us the opportunity to discuss your current situation. It is vital that we are kept informed of any change in your circumstances in order that we may assist you as much as possible.

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## Edit Document



Lorem ipsum dolor sit amet, consectetur adipiscing elit. Morbi quis mi elementum, feugiat quam id, congue nibh.

Brand:

☒ Clydesdale Bank

☐ Yorkshire Bank

First name:

John

Last name:

Smith

Address 1:

Flat 20

Address 2 (optional):

1234 Kingsland Road

County:

Greater London ▼

Country:

United Kingdom ▼

Post code:

WC2 4AB

Cancel

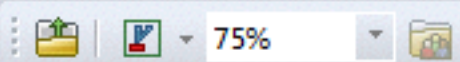
Create Document







File View



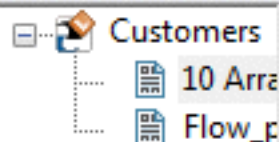
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1 2 3 4 5 6 7 8 9 10 11

Outline Viewer



1 of 2

☒ Submit for approval ☐ Submit for local print

Submit

Close



MR. WILLIAMS LEA  
1ST FLOOR,500 CAPABILITY GREEN  
LUTON  
LU1 3LS  
XXXX  
UK

Yorkshire Bank Home Loans  
1st Floor, 20 Merion Way  
Leeds  
LS2 8NZ

Telephone: 0844 6933 273 option 1  
Fax: (0113) 807 9482  
E-Mail:  
national@national-collections.co.uk

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Select a pending local  
print document for print

Williams Lea Document Creation Application

My documents 2

Create document


Approvals 5


Administration

Training material

# My Documents

 Search:

1-10 of 50 documents 

Document name ▼	Created ▼	Updated ▼	Status ▼
<input type="checkbox"/> Complaint letter Addressee: John Smith	Today at 14:45	Today at 14:45	<div>Rejected</div>
<input type="checkbox"/> Change payment Addressee: Thomas Sterling	Today at 10:22	Today at 10:22	<div>Pending local print</div>
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<input type="checkbox"/> Accounts in arrears Addressee: Thomas Sterling	Yesterday at 11:50	Yesterday at 11:50	<div>Submitted to print</div>
<input type="checkbox"/> Additional product Addressee: Thomas Sterling	30 June at 12:05	30 June at 12:05	<div>Rejected</div>
<input type="checkbox"/> Cross selling Addressee: Thomas Sterling	30 June at 15:29	30 June at 15:29	<div>Rejected</div>
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File View

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1 2 3 4 5 6 7 8 9 10 11

Outline Viewer

1 of 2

 Customers  
10 Arra  
Flow\_p☒ Submit for approval ☒ Submit for local print

Print

Close



Document Locked preventing Edit

MR. WILLIAMS LEA  
1ST FLOOR,500 CAPABILITY GREEN  
LUTON  
LU1 3LS  
XXXX  
UKYorkshire Bank Home Loans  
1st Floor, 20 Merion Way  
Leeds  
LS2 8NDTelephone: 0844 6933 273 option 1  
Fax: (0113) 807 9482  
E-Mail:  
national@national-collections.co.uk

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File View

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1 2 3 4 5 6 7 8 9 10 11

Outline Viewer

1 of 2

 Customers  
10 Arra  
Flow\_p☒ Submit for approval ☒ Submit for local print

Print

Close



Doc

Edit

MR. WILLIAMS LEA  
1ST FLOOR,500 CAPABILITY GREEN  
LUTON  
LU1  
YXX  
UK

Dear M

MORT  
REGU  
ARREThank  
dis cus  
order tAs dis  
£234.0Once t  
the full

The agreed amount is less than your current contractual mortgage payment and therefore arrears and additional interest will continue to accrue on the account each month. You should be aware that this may mean that your mortgage may not be repaid within the term you originally requested and as set out in your Mortgage offer.

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Please note that the amount stated above does not include any additional Step Up amount or Voluntary Overpayment that you may have previously agreed to pay and reflects only the contractual installment values.

Print

General

Select Printer

HP Officejet 7300 series (redirected 1)

HP psc 2400 Series (redirected 1)

Microsoft Office Live Meeting 2007 Document Writer

Status: Ready

☐ Print to file

Preferences

Location:

Comment:

Find Printer...

Page Range

☒ All

☐ Selection

☐ Current Page

Pages: 0

Number of copies: 1

☒ Collate

1 2 3

1 2 3

Enter either a single page number or a single page range. For example, 5-12

Print

Cancel

Apply

Select a pending  
approval document for  
viewing

Williams Lea Document Creation Application

My documents

2

Create document

Approvals

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Administration

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# My Documents

▼

Search:

Search by document name

Search

1-10 of 50 documents

↺

Document name ▼	Created ▼	Updated ▼	Status ▼
<div><input type="checkbox"/></div> <div>Complaint letter</div> <div>Addressee: John Smith</div>	Today at 14:45	Today at 14:45	Rejected
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File View

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1 2 3 4 5 6 7 8 9 10 11

Outline Viewer

1 of 2

 Customers  
10 Arra  
Flow\_p☒ Submit for approval ☐ Submit for local print

Submit

Close



Document Locked preventing Edit

MR. WILLIAMS LEA  
1ST FLOOR,500 CAPABILITY GREEN  
LUTON  
LU1 3LS  
XXXX  
UKYorkshire Bank Home Loans  
1st Floor, 20 Merion Way  
Leeds  
LS2 8NDTelephone: 0844 6933 273 option 1  
Fax: (0113) 807 9482  
E-Mail:  
national@national-collections.co.uk

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REGULAR PAYMENT: £1000.00  
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Select a submitted to  
print document for  
viewing

Williams Lea Document Creation Application



My documents

2

Create document

Approvals

5

Administration

Training material

# My Documents

▼

Search:

Search by document name

Search

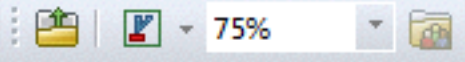
1-10 of 50 documents

↺

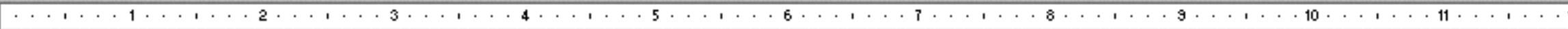
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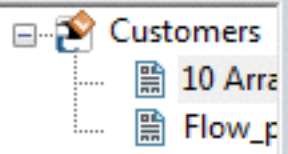
File View



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Outline Viewer

☐ Submit for approval ☐ Submit for local print

Submit

Close



MR. WILLIAMS LEA  
1ST FLOOR,500 CAPABILITY GREEN  
LUTON  
LU1 3LS  
XXXX  
UK

Document Locked preventing Edit

Yorkshire Bank Home Loans  
1st Floor, 20 Merion Way  
Leeds  
LS2 8ND

Telephone: 0844 6933 273 option 1  
Fax: (0113) 807 9482  
E-Mail:  
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Select a submitted to  
archive document for  
viewing or print

Williams Lea Document Creation Application

My documents

2

Create document

Approvals

5

Administration

Training material

# My Documents

▼

Search:

Search by document name

Search

1-10 of 50 documents

↺

Document name ▼	Created ▼	Updated ▼	Status ▼
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File View

75%

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1 2 3 4 5 6 7 8 9 10 11

Outline Viewer

1 of 2

 Customers  
10 Arra  
Flow\_p☒ Submit for approval ☒ Submit for local print

Print

Close



Document Locked preventing Edit

MR. WILLIAMS LEA  
1ST FLOOR,500 CAPABILITY GREEN  
LUTON  
LU1 3LS  
XXXX  
UKYorkshire Bank Home Loans  
1st Floor, 20 Merion Way  
Leeds  
LS2 8NDTelephone: 0844 6933 273 option 1  
Fax: (0113) 807 9482  
E-Mail:  
national@national-collections.co.uk

Dear MR. WILLIAMS LEA,

MORTGAGE ACCOUNT NO: 11128888452  
REGULAR PAYMENT: £1000.00  
ARREARS: £234.00

Thank you for contacting us regarding the arrears on your mortgage account and giving us the opportunity to discuss your current situation. It is vital that we are kept informed of any change in your circumstances in order that we may assist you as much as possible.

As discussed, we are prepared to set up a temporary payment arrangement with you and accept payments of £234.00 for the next \*\*\* month. The first payment is due by \*\*\* and on the same date monthly thereafter.

Once this arrangement has expired, we will expect full payment of the arrears and a return to the payment of the full monthly installments. (Delete if not appropriate)

The agreed amount is less than your current contractual mortgage payment and therefore arrears and additional interest will continue to accrue on the account each month. You should be aware that this may mean that your mortgage may not be repaid within the term you originally requested and as set out in your Mortgage offer.

\*\*\*\*\*remove if requested on letter template \*\*\*\*\*

Please note that the amount stated above does not include any additional Step Up amount or Voluntary Overpayment that you may have previously agreed to pay and reflects only the contractual installment values



File View

75%

Icons for editing and viewing

Outline Viewer

1 of 2

Customers

- 10 Arra
- Flow\_p

☒ Submit for approval ☒ Submit for local print

Print Close

Yorkshire Bank We care about here

MR. WILLIAMS LEA  
1ST FLOOR,500 CAPABILITY GREEN  
LUTON  
LU1  
XXXX  
UK

Doc Edit

Dear Mr

MORT  
REGU  
ARRE

Thank  
dis cus  
order t

As dis  
£234.0

Once t  
the full

The agreed amount is less than your current contractual mortgage payment and therefore arrears and additional interest will continue to accrue on the account each month. You should be aware that this may mean that your mortgage may not be repaid within the term you originally requested and as set out in your Mortgage offer.

\*\*\*\*\*remove if requested on letter template \*\*\*\*\*

Please note that the amount stated above does not include any additional Step Up amount or Voluntary Overpayment that you may have previously agreed to pay and reflects only the contractual installment values.

Print

General

Select Printer

- HP Officejet 7300 series (redirected 1)
- HP psc 2400 Series (redirected 1)
- Microsoft Office Live Meeting 2007 Document Writer

Status: Ready ☐ Print to file Preferences

Location: Find Printer...

Comment:

Page Range

☒ All ☐ Selection ☐ Current Page

Pages: 0

Enter either a single page number or a single page range. For example, 5-12

Number of copies: 1

☒ Collate

1 2 3 1 2 3

Print Cancel Apply

# Approvals

Williams Lea Document Creation Application

My documents

Create document

Approvals5

Administration

Training material

## Approvals



Search:

Search

1-5 of 5 documents



<input type="checkbox"/>	Document name ▼	Composer ▼	Submitted ▼	Department ▼	Status ▼
<input type="checkbox"/>	Complaint letter Addressee: John Smith	John Adams	30 June at 12:05	Mortgage Collections	Pending approval
<input type="checkbox"/>	Change payment Addressee: Thomas Sterling	Jane Doe	Yesterday at 09:34	Mortgage Collections	Pending approval
<input type="checkbox"/>	Contact customer Addressee: Thomas Sterling	John Adams	Yesterday at 11:09	Mortgage Collections	Pending approval
<input type="checkbox"/>	Accounts in arrears Addressee: Thomas Sterling	John Adams	Today at 10:22	Mortgage Collections	Pending approval
<input type="checkbox"/>	Additional product Addressee: Thomas Sterling	Jane Doe	Today at 12:25	Marketing and Sales	Pending approval



File View

75%



L

Outline Viewer

1 of 2

Customers

- 10 Arra
- Flow\_p

☐ Submit for approval ☒ Submit for local print

Approve

Reject

Cancel

Yorkshire  
BankWe  
care  
about  
here

MR. WILLIAMS LEA  
1ST FLOOR, 500 CAPABILITY GREEN  
LUTON  
LU1 3LS  
XXXX  
UK

Yorkshire Bank Home Loans  
1st Floor, 20 Merrion Way  
Leeds  
LS28NZ

Telephone: 0844 693 3273 option 1  
Fax: (0113) 807 9482  
E-Mail:  
national@national-collections.co.uk

Dear MR. WILLIAMS LEA,

MORTGAGE ACCOUNT NO: 11128888452  
REGULAR PAYMENT: £1000.00  
ARREARS: £234.00

Thank you for contacting us regarding the arrears on your mortgage account and giving us the opportunity to discuss your current situation. It is vital that we are kept informed of any change in your circumstances in order that we may assist you as much as possible.

As discussed, we are prepared to set up a temporary payment arrangement with you and accept payments of £234.00 for the next 12 months. The first payment is due by 1st October and on the same date monthly thereafter.

Once this arrangement has expired, we will expect full payment of the arrears and a return to the payment of the full monthly installments. (Delete if not appropriate)

The agreed amount is less than your current contractual mortgage payment and therefore arrears and additional interest will continue to accrue on the account each month. You should be aware that this may mean that your mortgage may not be repaid within the term you originally requested and as set out in your Mortgage offer.

\*\*\*\*\*remove if requested on letter template \*\*\*\*\*

Please note that the amount stated above does not include any additional Step Up amount or Voluntary Overpayment that you may have previously agreed to pay and reflects only the contractual installment

File View

75%

L

Outline Viewer

1 of 2

Customers

10 Arra

Flow\_p

☐ Submit for approval ☒ Submit for local print

Approve

Reject

Cancel

Yorkshire  
BankWe  
care  
about  
here

MR. WILLIAMS LEA  
1ST FLOOR, 500 CAPABILITY GREEN  
LUTON  
LU1 3LS  
XXXX  
UK

Yorkshire Bank Home Loans  
1st Floor, 20 Merrion Way  
Leeds  
LS28NZ

## Approve Document

You are about to approve **Complaint letter** composed by **John Adams**.

Are you sure you want to continue?

Dear M

MORT  
REGU  
ARRE

Cancel

Yes, approve

Thank you for contacting us regarding the arrears on your mortgage account and giving us the opportunity to discuss your current situation. It is vital that we are kept informed of any change in your circumstances in order that we may assist you as much as possible.

As discussed, we are prepared to set up a temporary payment arrangement with you and accept payments of **£234.00** for the next **\*\*\*** month. The first payment is due by **\*\*\*** and on the same date monthly thereafter.

Once this arrangement has expired, we will expect full payment of the arrears and a return to the payment of the full monthly installments. (Delete if not appropriate)

The agreed amount is less than your current contractual mortgage payment and therefore arrears and additional interest will continue to accrue on the account each month. You should be aware that this may mean that your mortgage may not be repaid within the term you originally requested and as set out in your Mortgage offer.

\*\*\*\*\*remove if requested on letter template \*\*\*\*\*

Please note that the amount stated above does not include any additional Step Up amount or Voluntary Overpayment that you may have previously agreed to pay and reflects only the contractual installment



Approve

Reject

Cancel



MR. WILLIAMS LEA  
1ST FLOOR,500 CAPABILITY GREEN  
LUTON  
LU1 3LS  
XXX  
UK

Yorkshire Bank Home Loans  
1st Floor, 20 Merrion Way  
Leeds  
LS2 8NZ

## Reject Document

You are about to reject Complaint letter composed by John Adams.

Are you sure you want to continue?

Dear M

MORT  
REGU  
ARRE

Cancel

Yes, reject

Thank you for contacting us regarding the arrears on your mortgage account and giving us the opportunity to discuss your current situation. It is vital that we are kept informed of any change in your circumstances in order that we may assist you as much as possible.

As discussed, we are prepared to set up a temporary payment arrangement with you and accept payments of £234.00 for the next \*\*\* month. The first payment is due by \*\*\* and on the same date monthly thereafter.

Once this arrangement has expired, we will expect full payment of the arrears and a return to the payment of the full monthly installments. (Delete if not appropriate)

The agreed amount is less than your current contractual mortgage payment and therefore arrears and additional interest will continue to accrue on the account each month. You should be aware that this may mean that your mortgage may not be repaid within the term you originally requested and as set out in your Mortgage offer.

\*\*\*\*\*remove if requested on letter template \*\*\*\*\*

Please note that the amount stated above does not include any additional Step Up amount or Voluntary Overpayment that you may have previously agreed to pay and reflects only the contractual installment amount.

My documents

Create document

Approvals

4

Administration

Training material

[Complain letter](#) successfully approved

## Approvals



Search:

*Search by document or composer*

Search

1-5 of 5 documents



<input type="checkbox"/>	Document name ▼	Composer ▼	Submitted ▼	Department ▼	Status ▼
<input type="checkbox"/>	Change payment Addressee: Thomas Sterling	Jane Doe	25 June at 12:05	Mortgage Collections	Pending approval
<input type="checkbox"/>	Contact customer Addressee: Thomas Sterling	John Adams	26 June at 12:05	Mortgage Collections	Pending approval
<input type="checkbox"/>	Accounts in arrears Addressee: Thomas Sterling	John Adams	26 June at 14:05	Mortgage Collections	Pending approval
<input type="checkbox"/>	Additional product Addressee: Thomas Sterling	Jane Doe	27 June at 12:05	Mortgage Collections	Pending approval

- My documents
- Create document
- Approvals

4
- Administration
- Training material

# Approvals



Search:

Search

0 documents with pending approval status. [View all approvals](#)

- My documents
- Create document
- Approvals

4
- Administration
- Training material

# Approvals



Search:

Search by document or composer

Search

Filters

Clear all

Status

☒ Pending approval (0)

☐ Rejected (12)

Department

☒ Mortgage Collections (0)

☒ Marketing and Sales (46)

☒ Human Resources (12)

Composer

☒ Jane Davis (0)

☒ John Adams (46)

☒ Alice Smith (12)

☒ Andy Jones (12)

Apply filters

0 documents with pending approval status. [View all approvals](#)

- My documents
- Create document
- Approvals

4
- Administration
- Training material

# Approvals

 Search:

Search

Filters

Clear all

Status

☐ Pending approval (0)

☐ Rejected (12)

Department

☐ Mortgage Collections (0)

☐ Marketing and Sales (46)

☐ Human Resources (12)

Composer

☐ Jane Davis (0)

☐ John Adams (46)

☐ Alice Smith (12)

☐ Andy Jones (12)

Apply filters

0 documents with pending approval status. [View all approvals](#)

My documents

Create document

Approvals

4

Administration

Training material

## Approvals

 Search:

Search

1-5 of 5 documents



<input type="checkbox"/>	Document name ▼	Composer ▼	Submitted ▼	Department ▼	Status ▼
<input type="checkbox"/>	Complaint letter Addressee: John Smith	John Adams	25 June at 12:05	Mortgage Collections	Rejected
	Change payment Addressee: Thomas Sterling	Jane Doe	26 June at 12:05	Mortgage Collections	Pending approval
<input type="checkbox"/>	Contact customer Addressee: Thomas Sterling	John Adams	26 June at 14:05	Mortgage Collections	Pending approval
<input type="checkbox"/>	Accounts in arrears Addressee: Thomas Sterling	John Adams	27 June at 12:05	Mortgage Collections	Pending approval
<input type="checkbox"/>	Additional product Addressee: Thomas Sterling	Jane Doe	28 June at 12:05	Marketing and Sales	Pending approval
<input type="checkbox"/>	Additional product Addressee: Thomas Sterling	Jane Doe	28 June at 16:05	Marketing and Sales	Pending approval
<input type="checkbox"/>	Additional product Addressee: Thomas Sterling	Jane Doe	28 June at 16:12	Marketing and Sales	Rejected
<input type="checkbox"/>	Additional product Addressee: Thomas Sterling	Jane Doe	30 June at 11:09	Marketing and Sales	Pending approval
<input type="checkbox"/>	Additional product Addressee: Thomas Sterling	Jane Doe	30 June at 12:05	Marketing and Sales	Rejected
<input type="checkbox"/>	Additional product Addressee: Thomas Sterling	Jane Doe	30 June at 13:04	Human Resources	Rejected



My documents

Create document

Approvals

4

Administration

Training material

## Approvals



Search:

Search by document or composer

Search

1-5 of 5 documents



<input type="checkbox"/>	Document name ▼	Composer ▼	Submitted ▼	Department ▼	Status ▼
<input type="checkbox"/>	Complaint letter Addressee: John Smith	John Adams	30 June at 12:05	Mortgage Collections	Pending approval
	Change payment Addressee: Thomas Sterling	Jane Doe	Yesterday at 09:34	Mortgage Collections	Pending approval
<input type="checkbox"/>	Contact customer Addressee: Thomas Sterling	John Adams	Yesterday at 11:09	Mortgage Collections	Pending approval
<input type="checkbox"/>	Accounts in arrears Addressee: Thomas Sterling	John Adams	Today at 10:22	Mortgage Collections	Pending approval
<input type="checkbox"/>	Additional product Addressee: Thomas Sterling	Jane Doe	Today at 12:25	Marketing and Sales	Pending approval

My documents

Create document

Approvals

4

Administration

Training material

## Approvals



Search:

Search by document or composer

Search

1-5 of 5 documents



<input type="checkbox"/>	Document name ▼	Composer ▼	Status ▼
<input checked="" type="checkbox"/>	Complaint letter Addressee: John Smith	John Adams	Pending approval
	Change payment Addressee: Thomas Sterling	Jane Doe	Pending approval
<input checked="" type="checkbox"/>	Contact customer Addressee: Thomas Sterling	John Adams	Pending approval
<input type="checkbox"/>	Accounts in arrears Addressee: Thomas Sterling	John Adams	Pending approval
<input type="checkbox"/>	Additional product Addressee: Thomas Sterling	Jane Doe	Pending approval

## Comments

Mandatory for rejections

orem ipsum dolor sit amet, consectetur adipiscing elit. Morbi sit amet ornare turpis, nec lobortis sem. Vestibulum ipsum turpis, iaculis ut lacus commodo, tempus elementum est.

Reject

Approve

## Approve Document



You are about to approve **multiple documents**.

Are you sure you want to continue?

Cancel

Yes, approve




- My documents
- Create document
- Approvals4
- Administration
- Training material

Documents successfully approved

## Approvals

 Search:

1-5 of 5 documents



<input type="checkbox"/>	Document name ▼	Composer ▼	Submitted ▼	Department ▼	Status ▼
<input type="checkbox"/>	Accounts in arrears Addressee: Thomas Sterling	John Adams	Today at 10:22	Mortgage Collections	<div>Pending approval</div>
<input type="checkbox"/>	Additional product Addressee: Thomas Sterling	Jane Doe	Today at 12:25	Marketing and Sales	<div>Pending approval</div>

# Access Management - Users

Williams Lea Document Creation Application

My documents

Create document

Approvals 4

Administration

Users

Groups

Departments

Training material

## Users

 Search:

Create user

1-10 of 50 users

<input type="checkbox"/>	User name ▼	Group ▼	Departments ▼	Signature uploaded? ▼	Status ▼
<input type="checkbox"/>	Bob Smith (S123457)	SomeGroupA	Mortgage Collections	Yes	Active
<input type="checkbox"/>	Bob Smith (S123458)	SomeGroupA	Mortgage Collections	Yes	Active
<input type="checkbox"/>	Bob Smith (S123459)	SomeGroupA	Mortgage Collections	Yes	Active
<input type="checkbox"/>	Bob Smith (S123460)	SomeGroupA	Mortgage Collections	Yes	Active
<input type="checkbox"/>	Bob Smith (S123461)	SomeGroupA	Mortgage Collections	No	Active
<input type="checkbox"/>	Bob Smith (S123462)	SomeGroupA	Mortgage Collections	Yes	Active
<input type="checkbox"/>	Bob Smith (S123463)	SomeGroupA	Mortgage Collections	No	Active
<input type="checkbox"/>	Bob Smith (S123464)	SomeGroupA	Mortgage Collections	Yes	Active
<input type="checkbox"/>	Bob Smith (S123465)	SomeGroupA	Mortgage Collections	Yes	Active
<input type="checkbox"/>	Bob Smith (S123466)	SomeGroupA	Mortgage Collections	No	Active

My documents

Create document

Approvals 4

Administration

Users

Groups

Departments

Training material

## Users

 Search:

Filters

[Clear all](#)

Group

☒ Mortgage Collections

☐ Marketing and Sales

☐ Human resources

☐ Lorem Ipsum Dolor

Department

☒ Mortgage Collections

☐ Marketing and Sales

☐ Human resources

☐ Lorem Ipsum Dolor

Status

☒ Active

☒ Locked

Apply filters

Create user

Group ▼	Departments ▼	Signature uploaded? ▼	Status ▼
SomeGroupA	Mortgage Collections	Yes	Active
SomeGroupA	Mortgage Collections	Yes	Active
SomeGroupA	Mortgage Collections	Yes	Active
SomeGroupA	Mortgage Collections	Yes	Active
SomeGroupA	Mortgage Collections	No	Active
SomeGroupA	Mortgage Collections	Yes	Active
SomeGroupA	Mortgage Collections	No	Active
SomeGroupA	Mortgage Collections	Yes	Active
SomeGroupA	Mortgage Collections	Yes	Active
SomeGroupA	Mortgage Collections	No	Active

☐ **Bob Smith** (S123466)

My documents

Create document

Approvals 4

Administration

Users

Groups

Departments

Training material

## Users

 Search:

Create user

1-10 of 50 users

<input type="checkbox"/>	User name ▼	Group ▼	Departments ▼	Signature uploaded? ▼	Status ▼
<input type="checkbox"/>	Bob Smith (S123457)	SomeGroupA	Mortgage Collections	Yes	Active
<input type="checkbox"/>	Bob Smith (S123458)	SomeGroupA	Mortgage Collections	Yes	Active
<input type="checkbox"/>	Bob Smith (S123459)	SomeGroupA	Mortgage Collections	Yes	Active
<input type="checkbox"/>	Bob Smith (S123460)	SomeGroupA	Mortgage Collections	Yes	Active
<input type="checkbox"/>	Bob Smith (S123461)	SomeGroupA	Mortgage Collections	No	Active
<input type="checkbox"/>	Bob Smith (S123462)	SomeGroupA	Mortgage Collections	Yes	Active
<input type="checkbox"/>	Bob Smith (S123463)	SomeGroupA	Mortgage Collections	No	Active
<input type="checkbox"/>	Bob Smith (S123464)	SomeGroupA	Mortgage Collections	Yes	Active
<input type="checkbox"/>	Bob Smith (S123465)	SomeGroupA	Mortgage Collections	Yes	Active
<input type="checkbox"/>	Bob Smith (S123466)	SomeGroupA	Mortgage Collections	No	Active




- My documents
- Create document
- Approvals 4
- Administration
- Users
- Groups
- Departments
- Training material

Users

 Search:

Alternative “Active” and “Locked” buttons  
(Bootstrap does not contain un-lock icon)

1-10 of 50 users 

Mark as:

<input type="checkbox"/>	User name	Group ▼	Departments ▼	Signature uploaded? ▼	Status ▼
<input checked="" type="checkbox"/>	Bob Smith (S123457)	SomeGroupA	Mortgage Collections	Yes	<input type="button" value="Active"/>
<input checked="" type="checkbox"/>	Bob Smith (S123458)	SomeGroupA	Mortgage Collections	Yes	<input type="button" value="Active"/>
<input checked="" type="checkbox"/>	Bob Smith (S123459)	SomeGroupA	Mortgage Collections	Yes	<input type="button" value="Active"/>
<input checked="" type="checkbox"/>	Bob Smith (S123460)	SomeGroupA	Mortgage Collections	Yes	<input type="button" value="Active"/>
<input checked="" type="checkbox"/>	Bob Smith (S123461)	SomeGroupA	Mortgage Collections	No	<input type="button" value="Active"/>
<input type="checkbox"/>	Bob Smith (S123462)	SomeGroupA	Mortgage Collections	Yes	<input type="button" value="Active"/>
<input type="checkbox"/>	Bob Smith (S123463)	SomeGroupA	Mortgage Collections	No	<input type="button" value="Active"/>
<input type="checkbox"/>	Bob Smith (S123464)	SomeGroupA	Mortgage Collections	Yes	<input type="button" value="Active"/>
<input type="checkbox"/>	Bob Smith (S123465)	SomeGroupA	Mortgage Collections	Yes	<input type="button" value="Active"/>
<input type="checkbox"/>	Bob Smith (S123466)	SomeGroupA	Mortgage Collections	No	<input type="button" value="Active"/>

<<

1

2

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4

5


>>

- My documents
- Create document
- Approvals 4
- Administration
- Users
- Groups
- Departments
- Training material

# Users

 Search:

1-10 of 50 users



Create user

<input type="checkbox"/>	User name	Group ▼	Departments ▼	Signature uploaded? ▼	Status ▼
<input checked="" type="checkbox"/>	Bob Smith (S123457)	SomeGroupA	Mortgage Collections	Yes	Active
<input checked="" type="checkbox"/>	Bob Smith (S123458)	SomeGroupA	Mortgage Collections	Yes	Active
<input checked="" type="checkbox"/>	Bob Smith (S123459)	SomeGroupA	Mortgage Collections	Yes	Active
<input checked="" type="checkbox"/>	Bob Smith (S123460)	SomeGroupA	Mortgage Collections	Yes	Active
<input checked="" type="checkbox"/>	Bob Smith (S123461)	SomeGroupA	Mortgage Collections	No	Active
<input type="checkbox"/>	Bob Smith (S123462)	SomeGroupA	Mortgage Collections	Yes	Active
<input type="checkbox"/>	Bob Smith (S123463)	SomeGroupA	Mortgage Collections	No	Active
<input type="checkbox"/>	Bob Smith (S123464)	SomeGroupA	Mortgage Collections	Yes	Active
<input type="checkbox"/>	Bob Smith (S123465)	SomeGroupA	Mortgage Collections	Yes	Active
<input type="checkbox"/>	Bob Smith (S123466)	SomeGroupA	Mortgage Collections	No	Active

<<

1

2

3

4

5

>>




- My documents
- Create document
- Approvals 4
- Administration
- Users
- Groups
- Departments
- Training material

Selected users could not be deleted. At least 1 administrator must remain.

## Users

 Search:

1-10 of 50 users



Create user

<input type="checkbox"/>	User name ▼	Group ▼	Departments ▼	Signature uploaded? ▼	Status ▼
<input checked="" type="checkbox"/>	Bob Smith (S123457)	SomeGroupA	Mortgage Collections	Yes	Active
<input checked="" type="checkbox"/>	Bob Smith (S123458)	SomeGroupA	Mortgage Collections	Yes	Active
<input type="checkbox"/>	Bob Smith (S123459)	SomeGroupA	Mortgage Collections	Yes	Active
<input type="checkbox"/>	Bob Smith (S123460)	SomeGroupA	Mortgage Collections	Yes	Active
<input type="checkbox"/>	Bob Smith (S123461)	SomeGroupA	Mortgage Collections	No	Active
<input type="checkbox"/>	Bob Smith (S123462)	SomeGroupA	Mortgage Collections	Yes	Active
<input type="checkbox"/>	Bob Smith (S123463)	SomeGroupA	Mortgage Collections	No	Active
<input type="checkbox"/>	Bob Smith (S123464)	SomeGroupA	Mortgage Collections	Yes	Active
<input type="checkbox"/>	Bob Smith (S123465)	SomeGroupA	Mortgage Collections	Yes	Active
<input type="checkbox"/>	Bob Smith (S123466)	SomeGroupA	Mortgage Collections	No	Active

## Edit User



Bob Smith

Active

First name:

John

Last name:

Smith

User ID:

0001\ S123456

☐

Credential reset required

Departments:

Mortgage Collections

Group:

SomeGroupA, SomeGroupB

Cancel

Save

## Edit User



Bob Smith

Active

First name:

John

Last name:

Smith

User ID:

0001\ S123456

☐ Credential reset required

Departments:

Mortgage Collections

Group:

SomeGroupA, SomeGroupB

- ☒ Mortgage Collections
- ☐ Marketing & Sales
- ☐ Human Resources
- ☐ Vestibulum Placerat
- ☐ Etiam Pharetra
- ☐ Maecenas Venenatis
- ☐ Sed Euismod

Add job title

Add job title

Cancel

Save

## Edit User



Bob Smith

Active

First name:

John

Last name:

Smith

User ID:

0001\ S123456

☐

Credential reset required

Departments:

Mortgage Collections, Marketing & Sales, Human Resources

Group:

SomeGroupA, SomeGroupB

- ☒ Mortgage Collections
- ☒ Marketing & Sales
- ☒ Human Resources
- ☐ Vestibulum Placerat
- ☐ Etiam Pharetra
- ☐ Maecenas Venenatis
- ☐ Sed Euismod

Add job title

Add job title

Cancel

Save

## Edit User



Bob Smith

Active

First name:

John

Last name:

Smith

User ID:

0001\ S123456

☐

Credential reset required

Departments:

Mortgage Collections, Marketing & Sales, Human Resources

Group:

SomeGroupA, SomeGroupB

- ☒ Mortgage Collections
- ☒ Marketing & Sales
- ☒ Human Resources
- ☐ Vestibulum Placerat
- ☐ Etiam Pharetra
- ☐ Maecenas Venenatis
- ☐ Sed Euismod

☒ ☐

Add job title

Cancel

Save

## Edit User



Bob Smith

Active

First name:

John

Last name:

Smith

User ID:

0001\ S123456

☐

Credential reset required

Departments:

Mortgage Collections, Marketing & Sales, Human Resources

Group:

SomeGroupA, SomeGroupB

- ☒ Mortgage Collections
- ☒ Marketing & Sales
- ☒ Human Resources
- ☐ Vestibulum Placerat
- ☐ Etiam Pharetra
- ☐ Maecenas Venenatis
- ☐ Sed Euismod

Customer Service Representative



Add job title

Cancel

Save



## Edit User



Bob Smith

Active

First name:

John

Last name:

Smith

User ID:

0001\ S123456

☐

Credential reset required

Departments:

Mortgage Collections, Marketing & Sales, Human Resources

Group:

SomeGroupA, SomeGroupB

- ☒ Mortgage Collections
- ☒ Marketing & Sales
- ☒ Human Resources
- ☐ Vestibulum Placerat
- ☐ Etiam Pharetra
- ☐ Maecenas Venenatis
- ☐ Sed Euismod

Customer Service Representative

Saved

Add job title

Cancel

Save

## Edit User



Bob Smith

Active

First name:

John

Last name:

Smith

User ID:

0001\ S123456

☐

Credential reset required

Departments:

Mortgage Collections, Marketing & Sales, Human Resources

Group:

SomeGroupA, SomeGroupB

- ☒ Mortgage Collections
- ☒ Marketing & Sales
- ☒ Human Resources
- ☐ Vestibulum Placerat
- ☐ Etiam Pharetra
- ☐ Maecenas Venenatis
- ☐ Sed Euismod

Customer Service Representative

Add job title

Cancel

Save

## Edit User



John

Smith

User ID:

0001\ S123456

☐ Credential reset required

Departments:

Mortgage Collections, Marketing &  
Sales, Human Resources

Group:

SomeGroupA, SomeGroupB

Signature block:

Signature name:

Enter a name

Upload image

No file selected

- Dimensions cannot not exceed 200x50.
- Allowed files jpg, png, gif
- Other rules

Cancel

Save

## Edit User



John

Smith

User ID:

0001\ S123456

☐ Credential reset required

Departments:

Mortgage Collections, Marketing &  
Sales, Human Resources

Group:

SomeGroupA, SomeGroupB

Signature block:

Signature name:

Enter a name

Upload image

mySignaure.jpg



Cancel

Save

## Edit User



John

Smith

User ID:

0001\ S123456

☐ Credential reset required

Departments:

Mortgage Collections, Marketing &  
Sales, Human Resources

Group:

SomeGroupA, SomeGroupB

Signature block:

Signature name:

Enter a name

Upload image

mySignaure.jpg

File exceeds 200x50

Cancel

Save

## Edit User



John

Smith

User ID:

0001\ S123456

☐ Credential reset required

Departments:

Mortgage Collections, Marketing &  
Sales, Human Resources

Group:

SomeGroupA, SomeGroupB

Signature block:

Signature name:

Enter a name

Upload image

mySignaure.jpg

Signature

Cancel

Save

## Edit User



John

Smith

User ID:

0001\ S123456

☐

Credential reset required

Departments:

Mortgage Collections, Marketing &  
Sales, Human Resources

Group:

SomeGroupA, SomeGroupB

Signature block:

Signature name:

Enter a name

Upload image

mySignaure.jpg

Signature



Cancel

Save



## Edit User



John

Smith

User ID:

0001\ S123456

☐ Credential reset required

Departments:

Mortgage Collections, Marketing &  
Sales, Human Resources

Group:

SomeGroupA, SomeGroupB

Signature block:

Signature name:

Enter a name

Upload image

No file selected

- Dimensions cannot not exceed 200x50.
- Allowed files jpg, png, gif
- Other rules

Cancel

Save

## Edit User



Bob Smith

Active

First name:

John

Last name:

Smith

User ID:

0001\ S123456

☐

Credential reset required

Departments:

Mortgage Collections, Marketing & Sales, Human Resources

Group:

SomeGroupA, SomeGroupB

Signature block:

Signature name:

Enter a name

Upload image

mySignaure.jpg

Cancel

Save

## Edit User



Bob Smith

Active

First name:

John

Last name:

Smith

User ID:

0001\ S123456

☒ Credential reset required

Password:

Enter a password

Confirm password:

Confirm password

Departments:

Mortgage Collections, Marketing &  
Sales, Human Resources

Group:

SomeGroupA, SomeGroupB

Cancel

Save

## Edit User



Bob Smith

Active

First name:

John

Last name:

Smith

User ID:

0001\ S123456

☒ Credential reset required

Password:

● ● ● ● ● ●

Confirm password:

● ● ● ● ● ●

Departments:

Mortgage Collections, Marketing &  
Sales, Human Resources

Group:

SomeGroupA, SomeGroupB

Cancel

Save



My documents

Create document

Approvals

4

Administration

Users

Groups

Departments

Training material

Bob Smith's information successfully updated

×

Users



Search:

Search by user name or ID

Search

Create user

1-10 of 50 users

<input type="checkbox"/>	User name ▼	Group ▼	Departments ▼	Signature uploaded? ▼	Status ▼
<input type="checkbox"/>	Bob Smith (S123457)	SomeGroupA	Mortgage Collections...	Yes	Active
<input type="checkbox"/>	Bob Smith (S123458)	SomeGroupA	Mortgage Collections	Yes	Active
<input type="checkbox"/>	Bob Smith (S123459)	SomeGroupA	Mortgage Collections	Yes	Active
<input type="checkbox"/>	Bob Smith (S123460)	SomeGroupA	Mortgage Collections	Yes	Active
<input type="checkbox"/>	Bob Smith (S123461)	SomeGroupA	Mortgage Collections	No	Active
<input type="checkbox"/>	Bob Smith (S123462)	SomeGroupA	Mortgage Collections	Yes	Active
<input type="checkbox"/>	Bob Smith (S123463)	SomeGroupA	Mortgage Collections	No	Active
<input type="checkbox"/>	Bob Smith (S123464)	SomeGroupA	Mortgage Collections	Yes	Active
<input type="checkbox"/>	Bob Smith (S123465)	SomeGroupA	Mortgage Collections	Yes	Active
<input type="checkbox"/>	Bob Smith (S123466)	SomeGroupA	Mortgage Collections	No	Active

## Create A User



First name:

Last name:

User ID:

0001\

Password:

Confirm password:

Departments:

Group:

Cancel

Save

## Create A User



First name:

Alphabetical values and spaces are allowed

Last name:

Enter surname

User ID:

0001\ Enter a user ID

Password:

Enter a password

Confirm password:

Confirm password

Departments:

Select a department

Group:

Select a group

Cancel

Save

### Text for tooltips:

First name, last name:

Alphabet or spaces are allowed

User ID:

Alpha-numerical values are allowed.

ID must be unique

Password:

Password must be between 6-12 characters. Must contain at least 1 number.



## Create A User



First name:

Andrew

Last name:

Smith

User ID:

0001\ S123456

Password:

●●●●●●

Confirm password:

●●●●●●

Departments:

Mortgage Collections, Human  
Resources, Marketing & Sales

Group:

Group A

Cancel

Save



## Create A User



Please correct the errors below.

First name:

Andrew

Last name:

Smith

User ID:

0001\ S123456

User ID is already taken

Password:

●●●●●●

Confirm password:

●●●●●●

Departments:

Mortgage Collections, Human  
Resources, Marketing & Sales

Group:

Group A

Cancel

Save

## Create A User



First name:

Andrew

Last name:

Smith

User ID:

0001\ S123459

Password:

●●●●●●

Confirm password:

●●●●●●

Departments:

Mortgage Collections, Human  
Resources, Marketing & Sales

Group:

Group A

Cancel

Save



My documents

Create document

Approvals

4

Administration

Users

Groups

Departments

Training material

Andrew Smith successfully created

×

Users



Search:

Search by user name or ID

Search

Create user

1-10 of 50 users

<input type="checkbox"/>	User ▼	Group ▼	Departments ▼	Signature uploaded? ▼	Status ▼
<input type="checkbox"/>	Andrew Smith (S123470)	Group A	Mortgage Collections...	Yes	Active
<input type="checkbox"/>	Bob Smith (S123458)	SomeGroupA	Mortgage Collections	Yes	Active
<input type="checkbox"/>	Bob Smith (S123459)	SomeGroupA	Mortgage Collections	Yes	Active
<input type="checkbox"/>	Bob Smith (S123460)	SomeGroupA	Mortgage Collections	Yes	Active
<input type="checkbox"/>	Bob Smith (S123461)	SomeGroupA	Mortgage Collections	No	Active
<input type="checkbox"/>	Bob Smith (S123462)	SomeGroupA	Mortgage Collections	Yes	Active
<input type="checkbox"/>	Bob Smith (S123463)	SomeGroupA	Mortgage Collections	No	Active
<input type="checkbox"/>	Bob Smith (S123464)	SomeGroupA	Mortgage Collections	Yes	Active
<input type="checkbox"/>	Bob Smith (S123465)	SomeGroupA	Mortgage Collections	Yes	Active
<input type="checkbox"/>	Bob Smith (S123466)	SomeGroupA	Mortgage Collections	No	Active

- My documents
- Create document
- Approvals

4
- Administration
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- Departments
- Training material

## Users



Search:

Search by user name or ID

Search

Create user

1-10 of 50 users

<input type="checkbox"/>	User ▼	Group ▼	Departments ▼	Signature uploaded? ▼	Status ▼
<input type="checkbox"/>	Andrew Smith (S123470)	Group A	Mortgage Collections...	<div><div>Mortgage Collections</div><div>Human Resources</div><div>Marketing &amp; Sales</div></div>	<div>Active</div>
<input type="checkbox"/>	Bob Smith (S123458)	SomeGroupA	Mortgage Collections		<div>Active</div>
<input type="checkbox"/>	Bob Smith (S123459)	SomeGroupA	Mortgage Collections	Yes	<div>Active</div>
<input type="checkbox"/>	Bob Smith (S123460)	SomeGroupA	Mortgage Collections	Yes	<div>Active</div>
<input type="checkbox"/>	Bob Smith (S123461)	SomeGroupA	Mortgage Collections	No	<div>Active</div>
<input type="checkbox"/>	Bob Smith (S123462)	SomeGroupA	Mortgage Collections	Yes	<div>Active</div>
<input type="checkbox"/>	Bob Smith (S123463)	SomeGroupA	Mortgage Collections	No	<div>Active</div>
<input type="checkbox"/>	Bob Smith (S123464)	SomeGroupA	Mortgage Collections	Yes	<div>Active</div>
<input type="checkbox"/>	Bob Smith (S123465)	SomeGroupA	Mortgage Collections	Yes	<div>Active</div>
<input type="checkbox"/>	Bob Smith (S123466)	SomeGroupA	Mortgage Collections	No	<div>Active</div>

- My documents
- Create document
- Approvals 4
- Administration
- Users
- Groups
- Departments
- Training material

# Users

 Search:

1-10 of 50 users



Create user

<input type="checkbox"/>	User ▼	Group ▼	Departments ▼	Signature uploaded? ▼	Status ▼
<input checked="" type="checkbox"/>	Andrew Smith (S123470)	Group A	Mortgage Collections...	Yes	Active
<input type="checkbox"/>	Bob Smith (S123458)	SomeGroupA	Mortgage Collections	Yes	Active
<input type="checkbox"/>	Bob Smith (S123459)	SomeGroupA	Mortgage Collections	Yes	Active
<input type="checkbox"/>	Bob Smith (S123460)	SomeGroupA	Mortgage Collections	Yes	Active
<input type="checkbox"/>	Bob Smith (S123461)	SomeGroupA	Mortgage Collections	No	Active
<input type="checkbox"/>	Bob Smith (S123462)	SomeGroupA	Mortgage Collections	Yes	Active
<input type="checkbox"/>	Bob Smith (S123463)	SomeGroupA	Mortgage Collections	No	Active
<input type="checkbox"/>	Bob Smith (S123464)	SomeGroupA	Mortgage Collections	Yes	Active
<input type="checkbox"/>	Bob Smith (S123465)	SomeGroupA	Mortgage Collections	Yes	Active
<input type="checkbox"/>	Bob Smith (S123466)	SomeGroupA	Mortgage Collections	No	Active

<<

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>>

## Delete User



You are about to delete **Andrew Smith (S123470)**.

Are you sure you want to continue?

Cancel


Yes, delete



- My documents
- Create document
- Approvals 4
- Administration
- Users
- Groups
- Departments
- Training material


Andrew Smith successfully deleted


Users


 Search:

Search

1-10 of 50 users







Create user

<input type="checkbox"/>	User ▼	Group ▼	Departments ▼	Signature uploaded? ▼	Status ▼
<input type="checkbox"/>	Bob Smith (S123458)	SomeGroupA	Mortgage Collections...	Yes	Active
<input type="checkbox"/>	Bob Smith (S123459)	SomeGroupA	Mortgage Collections	Yes	Active
<input type="checkbox"/>	Bob Smith (S123460)	SomeGroupA	Mortgage Collections	Yes	Active
<input type="checkbox"/>	Bob Smith (S123461)	SomeGroupA	Mortgage Collections	Yes	Active
<input type="checkbox"/>	Bob Smith (S123462)	SomeGroupA	Mortgage Collections	No	Active
<input type="checkbox"/>	Bob Smith (S123463)	SomeGroupA	Mortgage Collections	Yes	Active
<input type="checkbox"/>	Bob Smith (S123464)	SomeGroupA	Mortgage Collections	No	Active
<input type="checkbox"/>	Bob Smith (S123465)	SomeGroupA	Mortgage Collections	Yes	Active
<input type="checkbox"/>	Bob Smith (S123466)	SomeGroupA	Mortgage Collections	Yes	Active
<input type="checkbox"/>	Bob Smith (S123467)	SomeGroupA	Mortgage Collections	No	Active

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- My documents
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- Training material

Users




Search:


Search by user name or ID


Search

Users are already active

1-10 of 50 users







Create user

<input type="checkbox"/>	User ▼	Group ▼	Departments ▼	Signature uploaded? ▼	Status ▼
<input checked="" type="checkbox"/>	Bob Smith (S123458)	SomeGroupA	Mortgage Collections...	Yes	Active
<input checked="" type="checkbox"/>	Bob Smith (S123459)	SomeGroupA	Mortgage Collections	Yes	Active
<input type="checkbox"/>	Bob Smith (S123460)	SomeGroupA	Mortgage Collections	Yes	Active
<input type="checkbox"/>	Bob Smith (S123461)	SomeGroupA	Mortgage Collections	Yes	Active
<input type="checkbox"/>	Bob Smith (S123462)	SomeGroupA	Mortgage Collections	No	Locked
<input type="checkbox"/>	Bob Smith (S123463)	SomeGroupA	Mortgage Collections	Yes	Locked
<input type="checkbox"/>	Bob Smith (S123464)	SomeGroupA	Mortgage Collections	No	Active
<input type="checkbox"/>	Bob Smith (S123465)	SomeGroupA	Mortgage Collections	Yes	Active
<input type="checkbox"/>	Bob Smith (S123466)	SomeGroupA	Mortgage Collections	Yes	Active
<input type="checkbox"/>	Bob Smith (S123467)	SomeGroupA	Mortgage Collections	No	Active

<<

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- My documents
- Create document
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- Training material

Users



Search:

Search

1-10 of 50 users







Create user

<input type="checkbox"/>	User ▼	Group ▼	Departments ▼	Signature uploaded? ▼	Status ▼
<input type="checkbox"/>	Bob Smith (S123458)	SomeGroupA	Mortgage Collections...	Yes	Active
<input type="checkbox"/>	Bob Smith (S123459)	SomeGroupA	Mortgage Collections	Yes	Active
<input type="checkbox"/>	Bob Smith (S123460)	SomeGroupA	Mortgage Collections	Yes	Active
<input checked="" type="checkbox"/>	Bob Smith (S123461)	SomeGroupA	Mortgage Collections	Yes	Active
<input checked="" type="checkbox"/>	Bob Smith (S123462)	SomeGroupA	Mortgage Collections	No	Locked
<input checked="" type="checkbox"/>	Bob Smith (S123463)	SomeGroupA	Mortgage Collections	Yes	Locked
<input type="checkbox"/>	Bob Smith (S123464)	SomeGroupA	Mortgage Collections	No	Active
<input type="checkbox"/>	Bob Smith (S123465)	SomeGroupA	Mortgage Collections	Yes	Active
<input type="checkbox"/>	Bob Smith (S123466)	SomeGroupA	Mortgage Collections	Yes	Active
<input type="checkbox"/>	Bob Smith (S123467)	SomeGroupA	Mortgage Collections	No	Active

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- My documents
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Users' status successfully changed to **Active**

Users

Search:

Search by user name or ID

Search

1-10 of 50 users

Create user

<input type="checkbox"/>	User ▼	Group ▼	Departments ▼	Signature uploaded? ▼	Status ▼
<input type="checkbox"/>	<b>Bob Smith</b> (S123458)	SomeGroupA	Mortgage Collections...	Yes	Active
<input type="checkbox"/>	<b>Bob Smith</b> (S123459)	SomeGroupA	Mortgage Collections	Yes	Active
<input type="checkbox"/>	<b>Bob Smith</b> (S123460)	SomeGroupA	Mortgage Collections	Yes	Active
<input type="checkbox"/>	<b>Bob Smith</b> (S123461)	SomeGroupA	Mortgage Collections	Yes	Active
<input type="checkbox"/>	<b>Bob Smith</b> (S123462)	SomeGroupA	Mortgage Collections	No	Active
<input type="checkbox"/>	<b>Bob Smith</b> (S123463)	SomeGroupA	Mortgage Collections	Yes	Active
<input type="checkbox"/>	<b>Bob Smith</b> (S123464)	SomeGroupA	Mortgage Collections	No	Active
<input type="checkbox"/>	<b>Bob Smith</b> (S123465)	SomeGroupA	Mortgage Collections	Yes	Active
<input type="checkbox"/>	<b>Bob Smith</b> (S123466)	SomeGroupA	Mortgage Collections	Yes	Active
<input type="checkbox"/>	<b>Bob Smith</b> (S123467)	SomeGroupA	Mortgage Collections	No	Active

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- My documents
- Create document
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# Users

 Search:

Users are already locked

1-10 of 50 users



Create user

<input type="checkbox"/>	User ▼	Group ▼	Departments ▼	Signature uploaded? ▼	Status ▼
<input type="checkbox"/>	Bob Smith (S123458)	SomeGroupA	Mortgage Collections...	Yes	Active
<input type="checkbox"/>	Bob Smith (S123459)	SomeGroupA	Mortgage Collections	Yes	Active
<input type="checkbox"/>	Bob Smith (S123460)	SomeGroupA	Mortgage Collections	Yes	Active
<input type="checkbox"/>	Bob Smith (S123461)	SomeGroupA	Mortgage Collections	Yes	Active
<input checked="" type="checkbox"/>	Bob Smith (S123462)	SomeGroupA	Mortgage Collections	No	Locked
<input checked="" type="checkbox"/>	Bob Smith (S123463)	SomeGroupA	Mortgage Collections	Yes	Locked
<input type="checkbox"/>	Bob Smith (S123464)	SomeGroupA	Mortgage Collections	No	Active
<input type="checkbox"/>	Bob Smith (S123465)	SomeGroupA	Mortgage Collections	Yes	Active
<input type="checkbox"/>	Bob Smith (S123466)	SomeGroupA	Mortgage Collections	Yes	Active
<input type="checkbox"/>	Bob Smith (S123467)	SomeGroupA	Mortgage Collections	No	Active

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- My documents
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Users





Search:


Search by user name or ID

Search

1-10 of 50 users







Create user

<input type="checkbox"/>	User ▼	Group ▼	Departments ▼	Signature uploaded? ▼	Status ▼
<input type="checkbox"/>	Bob Smith (S123458)	SomeGroupA	Mortgage Collections...	Yes	Active
<input type="checkbox"/>	Bob Smith (S123459)	SomeGroupA	Mortgage Collections	Yes	Active
<input type="checkbox"/>	Bob Smith (S123460)	SomeGroupA	Mortgage Collections	Yes	Active
<input checked="" type="checkbox"/>	Bob Smith (S123461)	SomeGroupA	Mortgage Collections	Yes	Active
<input checked="" type="checkbox"/>	Bob Smith (S123462)	SomeGroupA	Mortgage Collections	No	Locked
<input checked="" type="checkbox"/>	Bob Smith (S123463)	SomeGroupA	Mortgage Collections	Yes	Locked
<input type="checkbox"/>	Bob Smith (S123464)	SomeGroupA	Mortgage Collections	No	Active
<input type="checkbox"/>	Bob Smith (S123465)	SomeGroupA	Mortgage Collections	Yes	Active
<input type="checkbox"/>	Bob Smith (S123466)	SomeGroupA	Mortgage Collections	Yes	Active
<input type="checkbox"/>	Bob Smith (S123467)	SomeGroupA	Mortgage Collections	No	Active

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- My documents
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Users' status successfully changed to **Locked**

Users

 Search:

Search

1-10 of 50 users



Create user

<input type="checkbox"/>	User ▼	Group ▼	Departments ▼	Signature uploaded? ▼	Status ▼
<input type="checkbox"/>	<b>Bob Smith</b> (S123458)	SomeGroupA	Mortgage Collections...	Yes	Active
<input type="checkbox"/>	<b>Bob Smith</b> (S123459)	SomeGroupA	Mortgage Collections	Yes	Active
<input type="checkbox"/>	<b>Bob Smith</b> (S123460)	SomeGroupA	Mortgage Collections	Yes	Active
<input type="checkbox"/>	<b>Bob Smith</b> (S123461)	SomeGroupA	Mortgage Collections	Yes	Locked
<input type="checkbox"/>	<b>Bob Smith</b> (S123462)	SomeGroupA	Mortgage Collections	No	Locked
<input type="checkbox"/>	<b>Bob Smith</b> (S123463)	SomeGroupA	Mortgage Collections	Yes	Locked
<input type="checkbox"/>	<b>Bob Smith</b> (S123464)	SomeGroupA	Mortgage Collections	No	Active
<input type="checkbox"/>	<b>Bob Smith</b> (S123465)	SomeGroupA	Mortgage Collections	Yes	Active
<input type="checkbox"/>	<b>Bob Smith</b> (S123466)	SomeGroupA	Mortgage Collections	Yes	Active
<input type="checkbox"/>	<b>Bob Smith</b> (S123467)	SomeGroupA	Mortgage Collections	No	Active

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# Access Management - Groups

Williams Lea Document Creation Application

My documents

Create document

Approvals 4

Administration

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Departments

Training material

## Groups

 Search:

1-10 of 20 groups

Create group

<input type="checkbox"/>	Group ▼	Status ▼
<input type="checkbox"/>	Group A	Active
<input type="checkbox"/>	Group B	Active
<input type="checkbox"/>	Group C	Active
<input type="checkbox"/>	Group D	Active
<input type="checkbox"/>	Group E	Active
<input type="checkbox"/>	Group F	Active
<input type="checkbox"/>	Group G	Suspended
<input type="checkbox"/>	Group H	Suspended
<input type="checkbox"/>	Group I	Suspended
<input type="checkbox"/>	Group J	Suspended






- My documents
- Create document
- Approvals

4
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- Training material

# Groups

 Search:

1-10 of 20 groups



Create group

<input type="checkbox"/>	Group ▼	Status ▼
<input checked="" type="checkbox"/>	Group A	Active
<input checked="" type="checkbox"/>	Group B	Active
<input type="checkbox"/>	Group C	Active
<input type="checkbox"/>	Group D	Active
<input type="checkbox"/>	Group E	Active
<input type="checkbox"/>	Group F	Active
<input type="checkbox"/>	Group G	Suspended
<input type="checkbox"/>	Group H	Suspended
<input type="checkbox"/>	Group I	Suspended
<input type="checkbox"/>	Group J	Suspended

<<

1

2

>>

## Create A Group



Name:

Role:

- ☐ Administrator
- ☐ Approver
- ☐ Composer

Cancel

Save

## Create A Group



N Alphabetical values and spaces are allowed

Role:

- ☐ Administrator
- ☐ Approver
- ☐ Composer

Cancel

Save

## Create A Group



Name:

myNewGroup

Role:

- ☐ Administrator
- ☐ Approver
- ☐ Composer

Cancel

Save

## Create A Group



Name:

myNewGroup

Role:

- ☒ Administrator
- ☐ Approver
- ☒ Composer

Cancel

Save

- My documents
- Create document
- Approvals 

4
- Administration**
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- Training material

myNewGroup successfully created 

✕

## Groups

🔍

 Search: 

Search

Create group

1-10 of 21 groups

<input type="checkbox"/>	Group ▼	Status ▼
<input type="checkbox"/>	myNewGroup	Active
<input type="checkbox"/>	Group A	Active
<input type="checkbox"/>	Group B	Active
<input type="checkbox"/>	Group C	Active
<input type="checkbox"/>	Group D	Active
<input type="checkbox"/>	Group E	Active
<input type="checkbox"/>	Group F	Suspended
<input type="checkbox"/>	Group G	Suspended
<input type="checkbox"/>	Group H	Suspended
<input type="checkbox"/>	Group I	Suspended

- My documents
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# Groups

▼

Search:

Search by group name

Search

1-10 of 21 groups

<input type="checkbox"/>	Group ▼	Status ▼
<input checked="" type="checkbox"/>	myNewGroup	Active
<input type="checkbox"/>	Group A	Active
<input type="checkbox"/>	Group B	Active
<input type="checkbox"/>	Group C	Active
<input type="checkbox"/>	Group D	Active
<input type="checkbox"/>	Group E	Active
<input type="checkbox"/>	Group F	Suspended
<input type="checkbox"/>	Group G	Suspended
<input type="checkbox"/>	Group H	Suspended
<input type="checkbox"/>	Group I	Suspended

<<

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## Delete Group



You are about to delete **myNewGroup**.

Are you sure you want to continue?

Cancel

Yes, delete





My documents

Create document

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Administration

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Training material

myNewGroup successfully deleted



# Groups

 Search:

Create group

1-10 of 20 groups

<input type="checkbox"/>	Group ▼	Status ▼
<input type="checkbox"/>	Group A	Active
<input type="checkbox"/>	Group B	Active
<input type="checkbox"/>	Group C	Active
<input type="checkbox"/>	Group D	Active
<input type="checkbox"/>	Group E	Active
<input type="checkbox"/>	Group F	Suspended
<input type="checkbox"/>	Group G	Suspended
<input type="checkbox"/>	Group H	Suspended
<input type="checkbox"/>	Group I	Suspended
<input type="checkbox"/>	Group J	Suspended

- My documents
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- Administration**
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- Departments
- 
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## Groups


 Search: 

Search

1-10 of 20 groups







Create group

<input type="checkbox"/>	Group ▼	Status ▼
<input checked="" type="checkbox"/>	Group A	Active
<input type="checkbox"/>	Group B	Active
<input type="checkbox"/>	Group C	Active
<input type="checkbox"/>	Group D	Active
<input type="checkbox"/>	Group E	Active
<input type="checkbox"/>	Group F	Suspended
<input type="checkbox"/>	Group G	Suspended
<input type="checkbox"/>	Group H	Suspended
<input type="checkbox"/>	Group I	Suspended
<input type="checkbox"/>	Group J	Suspended

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- My documents
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# Groups

▼

Search:

Search by group name

Search

1-10 of 20 groups

Create group

<input type="checkbox"/>	Group ▼	Status ▼
<input checked="" type="checkbox"/>	Group A	Active
<input checked="" type="checkbox"/>	Group B	Active
<input checked="" type="checkbox"/>	Group C	Active
<input checked="" type="checkbox"/>	Group D	Active
<input type="checkbox"/>	Group E	Active
<input type="checkbox"/>	Group F	Suspended
<input type="checkbox"/>	Group G	Suspended
<input type="checkbox"/>	Group H	Suspended
<input type="checkbox"/>	Group I	Suspended
<input type="checkbox"/>	Group J	Suspended

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- My documents
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4

Selected groups could not be deleted because they contain users.

✕

## Groups

Search:

Search by group name

Search

1-10 of 20 groups

🗑️

🔒

🔓

Create group

<input type="checkbox"/>	Group ▼	Status ▼
<input checked="" type="checkbox"/>	Group A	Active
<input checked="" type="checkbox"/>	Group C	Active
<input type="checkbox"/>	Group E	Active
<input type="checkbox"/>	Group F	Active
<input type="checkbox"/>	Group G	Active
<input type="checkbox"/>	Group H	Suspended
<input type="checkbox"/>	Group I	Suspended
<input type="checkbox"/>	Group J	Suspended
<input type="checkbox"/>	Group K	Suspended
<input type="checkbox"/>	Group L	Suspended

<<

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## Edit A Group



Group A

Active

Name:

Group A

Role:

- ☒ Administrator
- ☐ Approver
- ☒ Composer

Cancel

Save

- My documents
- Create document
- Approvals 


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- Departments
- Training material


# Groups


 Search: 

Search

1-10 of 20 groups 







Create group

<input type="checkbox"/>	Group ▼	Status ▼
<input checked="" type="checkbox"/>	Group A	Active
<input checked="" type="checkbox"/>	Group C	Active
<input checked="" type="checkbox"/>	Group E	Active
<input checked="" type="checkbox"/>	Group F	Active
<input checked="" type="checkbox"/>	Group G	Active
<input checked="" type="checkbox"/>	Group H	Suspended
<input checked="" type="checkbox"/>	Group I	Suspended
<input type="checkbox"/>	Group J	Suspended
<input type="checkbox"/>	Group K	Suspended
<input type="checkbox"/>	Group L	Suspended

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# Groups



Search:

Search

Groups are already active

1-10 of 20 groups







Selection of single group: Group is already active

Create group

<input type="checkbox"/>	Group ▼	Status ▼
<input checked="" type="checkbox"/>	Group A	Active
<input checked="" type="checkbox"/>	Group C	Active
<input checked="" type="checkbox"/>	Group E	Active
<input checked="" type="checkbox"/>	Group F	Active
<input checked="" type="checkbox"/>	Group G	Active
<input type="checkbox"/>	Group H	Suspended
<input type="checkbox"/>	Group I	Suspended
<input type="checkbox"/>	Group J	Suspended
<input type="checkbox"/>	Group K	Suspended
<input type="checkbox"/>	Group L	Suspended

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## Groups

▼

Search:

Search by group name

Search

Groups are already suspended

Selection of single group: Group is already suspended

Create group

1-10 of 20 groups

<input type="checkbox"/>	Group ▼	Status ▼
<input type="checkbox"/>	Group A	Active
<input type="checkbox"/>	Group C	Active
<input type="checkbox"/>	Group E	Active
<input type="checkbox"/>	Group F	Active
<input type="checkbox"/>	Group G	Active
<input checked="" type="checkbox"/>	Group H	Suspended
<input checked="" type="checkbox"/>	Group I	Suspended
<input checked="" type="checkbox"/>	Group J	Suspended
<input checked="" type="checkbox"/>	Group K	Suspended
<input checked="" type="checkbox"/>	Group L	Suspended



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Groups' status successfully changed to **Suspended**



## Groups

 Search:

Search

1-10 of 20 groups



Create group

<input type="checkbox"/>	Group ▼	Status ▼
<input type="checkbox"/>	Group A	Suspended
<input type="checkbox"/>	Group C	Suspended
<input type="checkbox"/>	Group E	Suspended
<input type="checkbox"/>	Group F	Suspended
<input type="checkbox"/>	Group G	Suspended
<input type="checkbox"/>	Group H	Suspended
<input type="checkbox"/>	Group I	Suspended
<input type="checkbox"/>	Group J	Suspended
<input type="checkbox"/>	Group K	Suspended
<input type="checkbox"/>	Group L	Suspended

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# Groups

▼

Search:

Search by group name

Search

1-10 of 20 groups

Create group

<input type="checkbox"/>	Group ▼	Status ▼
<input checked="" type="checkbox"/>	Group A	Active
<input checked="" type="checkbox"/>	Group C	Active
<input checked="" type="checkbox"/>	Group E	Active
<input checked="" type="checkbox"/>	Group F	Active
<input checked="" type="checkbox"/>	Group G	Active
<input checked="" type="checkbox"/>	Group H	Suspended
<input checked="" type="checkbox"/>	Group I	Suspended
<input type="checkbox"/>	Group J	Suspended
<input type="checkbox"/>	Group K	Suspended
<input type="checkbox"/>	Group L	Suspended

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Groups' status successfully changed to **Active**



## Groups



Search:

*Search by group name*

Search

1-10 of 20 groups



Create group

<input type="checkbox"/>	Group ▼	Status ▼
<input type="checkbox"/>	Group A	Active
<input type="checkbox"/>	Group C	Active
<input type="checkbox"/>	Group E	Active
<input type="checkbox"/>	Group F	Active
<input type="checkbox"/>	Group G	Active
<input type="checkbox"/>	Group H	Active
<input type="checkbox"/>	Group I	Active
<input type="checkbox"/>	Group J	Suspended
<input type="checkbox"/>	Group K	Suspended
<input type="checkbox"/>	Group L	Suspended

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# Access Management - Departments

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## Departments

▼

Search:

Search by department name

Search

1-10 of 10 departments

Create department

<input type="checkbox"/> Department ▼	User signature required	Status ▼
<input type="checkbox"/> Department A	Yes	Active
<input type="checkbox"/> Department B	Yes	Active
<input type="checkbox"/> Department C	Yes	Active
<input type="checkbox"/> Department D	Yes	Active
<input type="checkbox"/> Department E	Yes	Active
<input type="checkbox"/> Department F	No	Active
<input type="checkbox"/> Department G	Yes	Suspended
<input type="checkbox"/> Department H	Yes	Suspended
<input type="checkbox"/> Department I	No	Suspended
<input type="checkbox"/> Department J	No	Suspended

## Create A Department



Name

☐

Requires signature

Cancel

Save

## Create A Department



Name

☐

Requires signature

Cancel

Save

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myNewDepartment successfully created



## Departments

 Search:

Create department

1-10 of 10 departments

<input type="checkbox"/>	Department ▼	User signature required	Status ▼
<input type="checkbox"/>	myNewDepartment	No	Active
<input type="checkbox"/>	Department A	Yes	Active
<input type="checkbox"/>	Department B	Yes	Active
<input type="checkbox"/>	Department C	Yes	Active
<input type="checkbox"/>	Department D	Yes	Active
<input type="checkbox"/>	Department E	Yes	Active
<input type="checkbox"/>	Department F	No	Active
<input type="checkbox"/>	Department G	Yes	Suspended
<input type="checkbox"/>	Department H	Yes	Suspended
<input type="checkbox"/>	Department I	No	Suspended



## Edit Department



Name

☐

Requires signature

Cancel

Save



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Department name successfully changed



## Departments

 Search:

Create department

1-10 of 10 departments

<input type="checkbox"/>	Department ▼	User signature required	Status ▼
<input type="checkbox"/>	myNewDepartmentA	No	Active
<input type="checkbox"/>	Department A	Yes	Active
<input type="checkbox"/>	Department B	Yes	Active
<input type="checkbox"/>	Department C	Yes	Active
<input type="checkbox"/>	Department D	Yes	Active
<input type="checkbox"/>	Department E	Yes	Active
<input type="checkbox"/>	Department F	No	Active
<input type="checkbox"/>	Department G	Yes	Suspended
<input type="checkbox"/>	Department H	Yes	Suspended
<input type="checkbox"/>	Department I	No	Suspended

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## Departments

▼

Search:

Search by department name

Search

1-10 of 10 departments

Create department

<input type="checkbox"/>	Department	User signature required	Status ▼
<input checked="" type="checkbox"/>	myNewDepartmentA	No	Active
<input type="checkbox"/>	Department A	Yes	Active
<input type="checkbox"/>	Department B	Yes	Active
<input type="checkbox"/>	Department C	Yes	Active
<input type="checkbox"/>	Department D	Yes	Active
<input type="checkbox"/>	Department E	Yes	Active
<input type="checkbox"/>	Department F	No	Active
<input type="checkbox"/>	Department G	Yes	Suspended
<input type="checkbox"/>	Department H	Yes	Suspended
<input type="checkbox"/>	Department I	No	Suspended

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## Delete Department



You are about to delete **myNewDepartmentA**.

Are you sure you want to continue?

Cancel

Yes, delete

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myNewDepartmentA successfully deleted



## Departments

 Search:

Search

Create department

1-10 of 10 departments

<input type="checkbox"/>	Department ▼	User signature required	Status ▼
<input type="checkbox"/>	Department A	Yes	Active
<input type="checkbox"/>	Department B	Yes	Active
<input type="checkbox"/>	Department C	Yes	Active
<input type="checkbox"/>	Department D	Yes	Active
<input type="checkbox"/>	Department E	Yes	Active
<input type="checkbox"/>	Department F	No	Active
<input type="checkbox"/>	Department G	Yes	Suspended
<input type="checkbox"/>	Department H	Yes	Suspended
<input type="checkbox"/>	Department I	No	Suspended
<input type="checkbox"/>	Department J	No	Suspended

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## Departments

 Search:

1-10 of 10 departments







Create department

<input type="checkbox"/>	Department	User signature required	Status ▼
<input checked="" type="checkbox"/>	Department A	Yes	Active
<input type="checkbox"/>	Department B	Yes	Active
<input checked="" type="checkbox"/>	Department C	Yes	Active
<input type="checkbox"/>	Department D	Yes	Active
<input type="checkbox"/>	Department E	Yes	Active
<input type="checkbox"/>	Department F	No	Active
<input type="checkbox"/>	Department G	Yes	Suspended
<input type="checkbox"/>	Department H	Yes	Suspended
<input type="checkbox"/>	Department I	No	Suspended
<input type="checkbox"/>	Department J	No	Suspended

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## Departments

▼

Search:

Search by department name

Search

1-10 of 10 departments

Create department

<input type="checkbox"/>	Department	User signature required	Status ▼
<input checked="" type="checkbox"/>	Department A	Yes	Active
<input checked="" type="checkbox"/>	Department B	Yes	Active
<input checked="" type="checkbox"/>	Department C	Yes	Active
<input type="checkbox"/>	Department D	Yes	Active
<input type="checkbox"/>	Department E	Yes	Active
<input type="checkbox"/>	Department F	No	Active
<input type="checkbox"/>	Department G	Yes	Suspended
<input type="checkbox"/>	Department H	Yes	Suspended
<input type="checkbox"/>	Department I	No	Suspended
<input type="checkbox"/>	Department J	No	Suspended

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Selected departments could not be deleted because they contain users.



## Departments

 Search:

Search

1-10 of 10 departments



Create department

<input type="checkbox"/>	Department ▼	User signature required	Status ▼
<input checked="" type="checkbox"/>	Department A	Yes	Active
<input checked="" type="checkbox"/>	Department C	Yes	Active
<input type="checkbox"/>	Department D	Yes	Active
<input type="checkbox"/>	Department E	Yes	Active
<input type="checkbox"/>	Department F	No	Active
<input type="checkbox"/>	Department G	Yes	Suspended
<input type="checkbox"/>	Department H	Yes	Suspended
<input type="checkbox"/>	Department I	No	Suspended
<input type="checkbox"/>	Department J	No	Suspended
<input type="checkbox"/>	Department K	Yes	Suspended



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## Departments

▼

Search:

Search by department name

Search

Departments are already active

Selection of single dept.: Department is already active

Create department

1-10 of 10 departments

<input type="checkbox"/>	Department ▼	User signature required	Status ▼
<input checked="" type="checkbox"/>	Department A	Yes	Active
<input checked="" type="checkbox"/>	Department C	Yes	Active
<input checked="" type="checkbox"/>	Department D	Yes	Active
<input checked="" type="checkbox"/>	Department E	Yes	Active
<input checked="" type="checkbox"/>	Department F	No	Active
<input type="checkbox"/>	Department G	Yes	Suspended
<input type="checkbox"/>	Department H	Yes	Suspended
<input type="checkbox"/>	Department I	No	Suspended
<input type="checkbox"/>	Department J	No	Suspended
<input type="checkbox"/>	Department K	Yes	Suspended

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# Departments

Y

Search:

Search by department name

Search

Departments are already suspended

1-10 of 10 departments

Selection of single dept.: Department is already suspended

Create department

<input type="checkbox"/>	Department ▼	User signature required	Status ▼
<input type="checkbox"/>	Department A	Yes	Active
<input type="checkbox"/>	Department C	Yes	Active
<input type="checkbox"/>	Department D	Yes	Active
<input type="checkbox"/>	Department E	Yes	Active
<input type="checkbox"/>	Department F	No	Active
<input checked="" type="checkbox"/>	Department G	Yes	Suspended
<input checked="" type="checkbox"/>	Department H	Yes	Suspended
<input checked="" type="checkbox"/>	Department I	No	Suspended
<input checked="" type="checkbox"/>	Department J	No	Suspended
<input checked="" type="checkbox"/>	Department K	Yes	Suspended

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## Departments

▼

Search:

Search by department name

Search

1-10 of 10 departments

Create department

<input type="checkbox"/>	Department ▼	User signature required	Status ▼
<input checked="" type="checkbox"/>	Department A	Yes	Active
<input checked="" type="checkbox"/>	Department C	Yes	Active
<input checked="" type="checkbox"/>	Department D	Yes	Active
<input checked="" type="checkbox"/>	Department E	Yes	Active
<input checked="" type="checkbox"/>	Department F	No	Active
<input checked="" type="checkbox"/>	Department G	Yes	Suspended
<input checked="" type="checkbox"/>	Department H	Yes	Suspended
<input type="checkbox"/>	Department I	No	Suspended
<input type="checkbox"/>	Department J	No	Suspended
<input type="checkbox"/>	Department K	Yes	Suspended

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Departments' status successfully changed to **Suspended**



# Departments

 Search:

1-10 of 10 departments



Create department

<input type="checkbox"/>	Department ▼	User signature required	Status ▼
<input type="checkbox"/>	Department A	Yes	Suspended
<input type="checkbox"/>	Department C	Yes	Suspended
<input type="checkbox"/>	Department D	Yes	Suspended
<input type="checkbox"/>	Department E	Yes	Suspended
<input type="checkbox"/>	Department F	No	Suspended
<input type="checkbox"/>	Department G	Yes	Suspended
<input type="checkbox"/>	Department H	Yes	Suspended
<input type="checkbox"/>	Department I	No	Suspended
<input type="checkbox"/>	Department J	No	Suspended
<input type="checkbox"/>	Department K	Yes	Suspended

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Departments

▼

Search:

Search by department name

Search

1-10 of 10 departments

Create department

<input type="checkbox"/>	Department ▼	User signature required	Status ▼
<input checked="" type="checkbox"/>	Department A	Yes	Active
<input checked="" type="checkbox"/>	Department C	Yes	Active
<input checked="" type="checkbox"/>	Department D	Yes	Active
<input checked="" type="checkbox"/>	Department E	Yes	Active
<input checked="" type="checkbox"/>	Department F	No	Active
<input checked="" type="checkbox"/>	Department G	Yes	Suspended
<input checked="" type="checkbox"/>	Department H	Yes	Suspended
<input type="checkbox"/>	Department I	No	Suspended
<input type="checkbox"/>	Department J	No	Suspended
<input type="checkbox"/>	Department K	Yes	Suspended

<<

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Departments' status successfully changed to **Active**



# Departments

 Search:

Search

1-10 of 10 departments



Create department

<input type="checkbox"/>	Department ▼	User signature required	Status ▼
<input type="checkbox"/>	Department A	Yes	Active
<input type="checkbox"/>	Department C	Yes	Active
<input type="checkbox"/>	Department D	Yes	Active
<input type="checkbox"/>	Department E	Yes	Active
<input type="checkbox"/>	Department F	No	Active
<input type="checkbox"/>	Department G	Yes	Active
<input type="checkbox"/>	Department H	Yes	Active
<input type="checkbox"/>	Department I	No	Suspended
<input type="checkbox"/>	Department J	No	Suspended
<input type="checkbox"/>	Department K	Yes	Suspended

# Branding sample wireframe

Williams Lea Document Creation Application

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## My Documents


 Search:

1-4 of 4 documents

Document name ▼	Created ▼	Updated ▼	Status ▼
<b>Additional product</b> <small>Addressee: Thomas Sterling</small>	30 June at 12:05	Today at 14:45	Approved
<b>Cross selling</b> <small>Addressee: Thomas Sterling</small>	30 June at 15:29	Today at 10:22	Approved
<b>Cross selling</b> <small>Addressee: Thomas Sterling</small>	30 June at 15:44	Yesterday at 09:34	Approved
<b>Cross selling</b> <small>Addressee: Thomas Sterling</small>	28 June at 10:17	Yesterday at 09:34	Approved



# Searching

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My Documents

▼

Search:

Search by document name

Search

Create document

1-10 of 50 documents

Document name ▼	Created ▼	Updated ▼	Status ▼
Complaint letter Addressee: John Smith	Today at 14:45	Today at 14:45	Approved
Change payment Addressee: Thomas Sterling	Today at 10:22	Today at 10:22	Approved
Contact customer Addressee: Thomas Sterling	Yesterday at 09:34	Yesterday at 09:34	Pending approval
Accounts in arrears Addressee: Thomas Sterling	Yesterday at 11:50	Yesterday at 11:50	Pending batch print
Additional product Addressee: Thomas Sterling	30 June at 12:05	30 June at 12:05	Approved
Cross selling Addressee: Thomas Sterling	30 June at 15:29	30 June at 15:29	Draft
Cross selling Addressee: Thomas Sterling	30 June at 15:44	30 June at 15:44	Pending local print
Cross selling Addressee: Thomas Sterling	28 June at 10:17	28 June at 10:17	Pending batch print
Cross selling Addressee: Thomas Sterling	27 June at 11:18	27 June at 11:18	Rejected
Cross selling Addressee: Thomas Sterling	26 June at 13:56	26 June at 13:56	Rejected

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My Documents

▼

Search:

Cross selling

×

Search

Create document

1-5 of 5 documents found for “Cross selling”

Document name ▼	Created ▼	Updated ▼	Status ▼
Cross selling Addressee: Thomas Sterling	30 June at 15:29	30 June at 15:29	Draft
Cross selling Addressee: Thomas Sterling	30 June at 15:44	30 June at 15:44	Pending local print
Cross selling Addressee: Thomas Sterling	28 June at 10:17	28 June at 10:17	Pending batch print
Cross selling Addressee: Thomas Sterling	27 June at 11:18	27 June at 11:18	Rejected
Cross selling Addressee: Thomas Sterling	26 June at 13:56	26 June at 13:56	Rejected

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My Documents

▼

Search:

Search by document name

Search

Create document

1-10 of 50 documents

Document name ▼	Created ▼	Updated ▼	Status ▼
Complaint letter Addressee: John Smith	Today at 14:45	Today at 14:45	Approved
Change payment Addressee: Thomas Sterling	Today at 10:22	Today at 10:22	Approved
Contact customer Addressee: Thomas Sterling	Yesterday at 09:34	Yesterday at 09:34	Pending approval
Accounts in arrears Addressee: Thomas Sterling	Yesterday at 11:50	Yesterday at 11:50	Pending batch print
Additional product Addressee: Thomas Sterling	30 June at 12:05	30 June at 12:05	Approved
Cross selling Addressee: Thomas Sterling	30 June at 15:29	30 June at 15:29	Draft
Cross selling Addressee: Thomas Sterling	30 June at 15:44	30 June at 15:44	Pending local print
Cross selling Addressee: Thomas Sterling	28 June at 10:17	28 June at 10:17	Pending batch print
Cross selling Addressee: Thomas Sterling	27 June at 11:18	27 June at 11:18	Rejected
Cross selling Addressee: Thomas Sterling	26 June at 13:56	26 June at 13:56	Rejected

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▼

Search:

×

Search

Create document

0 documents found for “sdfslkdjflsdkj”

Document name ▼	Created ▼	Updated ▼	Status ▼
No results returned for this search			