

## GUANZON Credit Application User Guide

### Update Note:

Entry of Credit application is the same like it used to be. We just added some features for applications with **QM Result** beginning with **CI**. Applications having QM results with CI are now approved by the assigned CI or branch collector using the Guanzon Approval Code app.

### Application Entry

1. Empty credit application form.

The screenshot shows the 'Credit Application' window with the Transaction No. M00119-000001. The form is divided into several sections: Applicant Info, Application Information, and Spouse Info. The Applicant Info section includes fields for Name, Address, Birth Date, Birth Place, Civil Status (set to Single), and Occupation. The Application Information section includes Application Date (2/8/2019), Application Type (New Customer), Unit Applied (Motorcycle), Specity, Model, Gross Price (0.00), PN Value (0.00), Down Payment (0.00), Term (0), Monthly Amort. (0.00), Credit Investigator, Quick Match No., and a checkbox for With Financier. The Spouse Info section includes fields for Name, Address, Birth Date, Birth Place, and Occupation (set to 0). A sidebar on the left contains buttons for Save, Search, Del. Row, and Cancel.

2. Filled up application form.

The screenshot shows the 'Credit Application' window with the Transaction No. M00119-000001. The form is filled out with the following data: Applicant Info: Name (Gabriel, Fernando Ravanzo), Address (Calmay North, Dagupan City, Pangasinan 2400), Birth Date (Feb. 07, 1982), Birth Place (Dagupan City, Pangasinan 2400), Civil Status (Separated), Occupation (Tricycle Driver). Application Information: Application Date (2/8/2019), Application Type (New Customer), Unit Applied (Motorcycle), Specity (Honda), Model (TMX 125a), Gross Price (101,172.00), PN Value (98,172.00), Down Payment (3,000.00), Term (3), Monthly Amort. (2,727.00), Credit Investigator (Sambillon, Jemel Muyargas), Quick Match No., and a checkbox for With Financier. The Spouse Info section is empty. A sidebar on the left contains buttons for Save, Search, Del. Row, and Cancel.

3. Saving the credit application.

**Credit Application**

**QM Result**

Transaction No: **M00119000001**

Applicant: Gabriel, Fernando Ravanzo  
Address: Calmay North, Dagupan City, Pangasinan 2400

Application No: M00119000001  
Date: February 08, 2019

Spouse: N-O-N-E  
Address: N-O-N-E

**QM RESULT**  
**CI-0000-00U**

Name	QM Result	Acct#	MCS0 Ref#	Appl Ref#
001 Gabriel, Fernando	CI0000000U			
002 Gabriel, Fernando	CI0000000U			
003 Gabriel, Fernando	CI0000000U			
004 Gabriel, Fernando	CI0000000U			
005 Gabriel, Fernando	CI0000000U			
006 Gabriel, Fernando	CI0000000U			

Buttons: Save, Search, Del. Row, Cancel

Financial Fields: 3,000.00, 2,727.00, 36, Auto-Compute, 19.95, yrs.

Occupation: U

As you can see, the QM Result has initial 2 characters of “CI”. After you click the “Ok” button, please wait for a few seconds for the processing of application to be uploaded to the main office (10-20 seconds). Upon saving, the next illustrations may appear.

**Credit Application**

Transaction No: **M00119-000001**

**Applicant Info**

Name: Gabriel, Fernando Ravanzo  
Birth Date: Feb. 07, 1982  
Age: 37.00 yrs  
Address: Calmay North, Dagupan City, Pangasinan 2400  
Birth Place: Dagupan City, Pangasinan 2400

Civil Status: Separated  
Occupation: Tricycle Driver

**Application Information**

Application Date: 2/8/2019

Application Type: New Cu  
Unit Applied: Motorcy  
Specify: Honda  
Model: TMX 12  
Gross Price:   
PN Value:

**Spouse Info**

Name:   
Birth Date:   
Age:   
Address:   
Birth Place:   
Occupation: 0

**Notice**

CI APPROVAL request submitted.  
Please provide these information to your CI/Collector for approval.  
TRANSACTION NO.: GAP019000001 BRANCH: M001

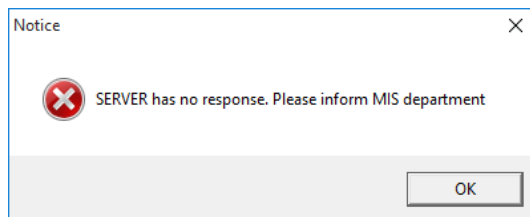
Buttons: Save, Search, Del. Row, Cancel

Financial Fields: 3,000.00, 2,727.00, 36, Auto-Compute, 19.95, yrs.

Please check the alert box, take note of the **TRANSACTION NO.** and **BRANCH**, and give this information to your CI or collector for the application approval code.

For this example, the **Transaction No.** is **GAP019000001** and the **Branch** is **M001**.

If the uploading of data to main office is not successful, (*this alert box may appear*), but don't be alarmed, it is just an alert, it will continue saving upon clicking Okay button. No internet connection is the reason why this alert appears. Until internet connection is not working, approval of Credit Application will not work also.



4. Save successful.

A screenshot of the "Credit Application" software interface. The main window has a blue header and a sidebar on the left with buttons for "Save", "Search", "Del. Row", and "Cancel". The main area contains several sections: "Applicant Info" with fields for Name, Address, Birth Date, Birth Place, Civil Status, and Occupation; "Application Information" with fields for Application Date, Application Type, Unit Applied, Specify, Model, Gross Price, and PN Value; and "Spouse Info" with fields for Name, Address, Birth Date, Birth Place, and Occupation. A "Notice" dialog box is overlaid in the center, displaying an information icon and the text "Transaction Saved Successfully!!!". The dialog box has an "OK" button at the bottom.

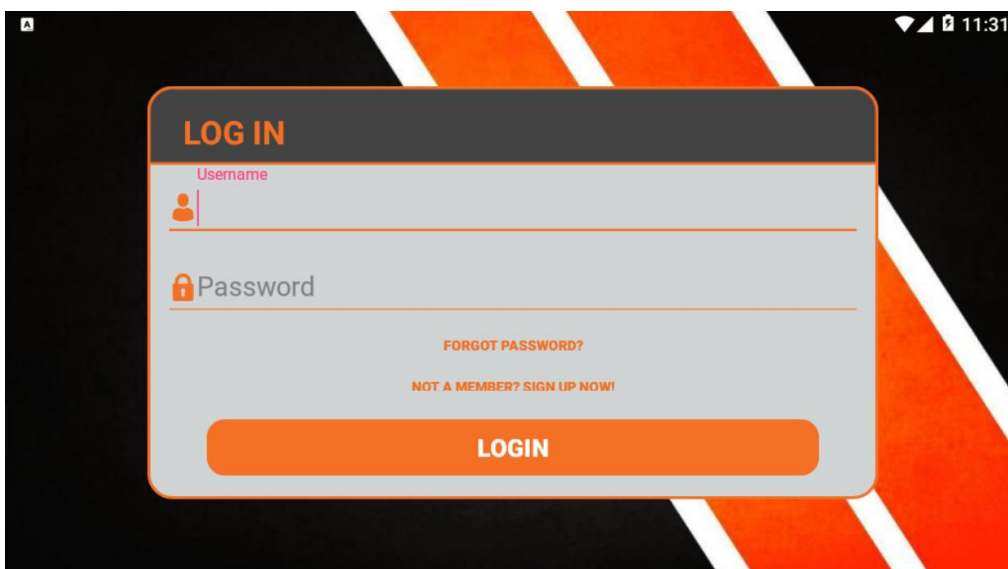
**Approval Code Issuance** (For Credit Investigators or Collector)

Approval codes for **CI** QM Results are given by the CI that is assigned from credit application entry. The CI or collector must install the app to their mobile phone or the branch service phones. Please refer to **“Approval Code Installation Guide.pdf”** for the application installation and **“User Management Procedure.pdf”** for the signup process.

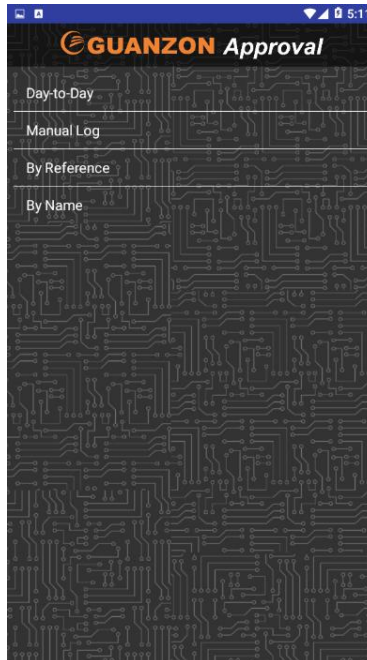
1. App splash screen



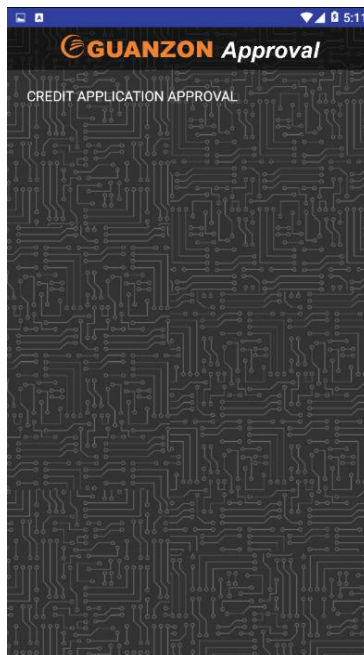
2. User login



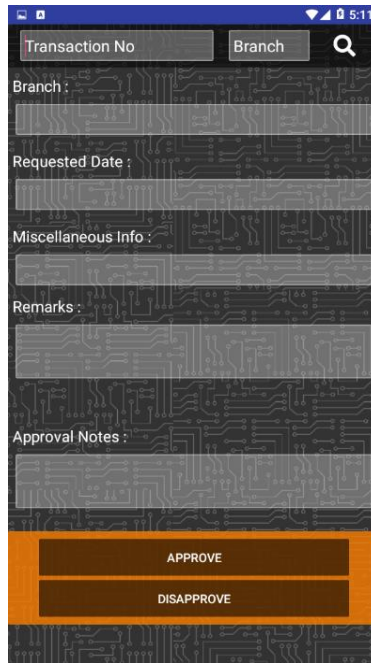
3. App main screen. Please choose “By Name” category for the approval.



4. Select “CREDIT APPLICATION APPROVAL”



5. Approval screen

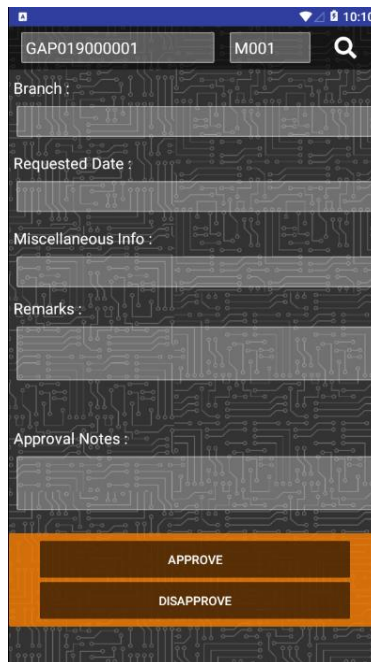


Transaction No    Branch    🔍

Branch :  
Requested Date :  
Miscellaneous Info :  
Remarks :  
Approval Notes :

APPROVE  
DISAPPROVE

6. Type the **TRANSACTION NO.** and **BRANCH** on the respective fields and tick the search icon.

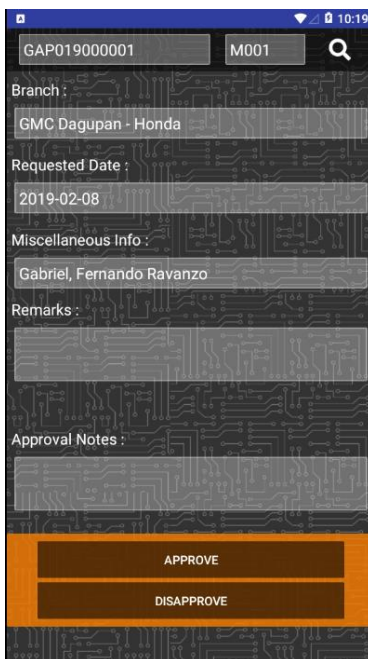


GAP019000001    M001    🔍

Branch :  
Requested Date :  
Miscellaneous Info :  
Remarks :  
Approval Notes :

APPROVE  
DISAPPROVE

7. The app may look like this if the retrieval of data from the main office is successful.



Transaction No: GAP019000001    Branch: M001

Branch :  
GMC Dagupan - Honda

Requested Date :  
2019-02-08

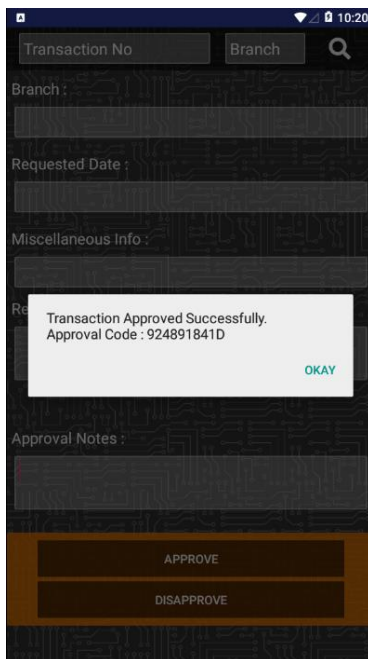
Miscellaneous Info :  
Gabriel, Fernando Ravanzo

Remarks :

Approval Notes :

APPROVE  
DISAPPROVE

8. Fill up the approval notes and tick “APPROVE” button. Or “DISAPPROVE” button for disapproved applications. For approved applications, the app will issue an **approval code**, and that code will be used by the branch to approve the encoded credit application.



Transaction No: Transaction No    Branch: Branch

Branch :  
Requested Date :  
Miscellaneous Info :  
Remarks :

Approval Notes :

Transaction Approved Successfully.  
Approval Code : 924891841D  
OKAY

APPROVE  
DISAPPROVE

For this example, the Approval Code is **924891841D**.

## Application Approval

1. Load the application entry.

The screenshot shows the 'Credit Application Approval/Disapproval' window. The 'Transaction No.' is M00119000001 and the 'Full Name' is Gabriel, Fernando Ravanzo. The application status is 'CLOSED'. The customer's details include Name, Nickname, Civil Status (Separated), Contact No., Birth Date (Feb 07, 1982), Birth Place (Dagupan City, Pangasinan 2400), Length of Stay, Address (Calmay North, Dagupan City, Pangasinan 2400), and Former Address. The 'Application Information' tab is active, showing the Application Date (Feb 08, 2019), Application Type (New Customer), Unit Applied (Motorcycle), Specify (Honda), Gross Price (101,172.00), PN Value (98,172.00), Down Payment (3,000.00), Model (TMX 125a), Term (36), Monthly Amort. (2,727.00), Credit Investigator (Sambillon, Jemel Muyargas), and Quick Match No. (C1000000U).

2. Click "Approve" button for approved applications and confirm, else "DisApprv".

The screenshot shows the same 'Credit Application Approval/Disapproval' window, but with a confirmation dialog box open. The dialog box has a question mark icon and the text 'Approved Customer Credit Application!!!'. It has 'Yes' and 'No' buttons. The background window is slightly dimmed, showing the same application details as the previous screenshot.



- The system will ask for approval code and approving officer.

The screenshot shows the 'Credit Application Approval/Disapproval' window. A modal dialog box titled 'SYSTEM CODE APPROVAL' is displayed in the center. The dialog contains the text: 'System Approval is required by the object. Seek assistance from an AUTHORIZED PERSONNEL.' Below this text are two input fields: 'Code' and 'Issuee'. At the bottom of the dialog are 'OK' and 'Cancel' buttons. The background of the dialog features a clock face and the text 'Time to GO!'. The main window behind the dialog shows transaction details for Transaction No. M00119000001 and Full Name Gabriel, Fernando Ravanzo. It also includes a sidebar with buttons for 'Browse', 'Approve', 'DisApprv', and 'Close', and a table of financial data.

Specify	Value	Monthly Amort.	Value
Gross Price	101,172.00	Credit Investigator	Sambillon, Jemel Muyargas
PN Value	98,172.00	Quick Match No.	C1000000U
Down Payment	3,000.00		

- Please encode the approval code that was issued by your CI or collector and type his full name on the issue portion, or search using "F3" on the keyboard.

This screenshot shows the same 'Credit Application Approval/Disapproval' window as the previous one, but the 'SYSTEM CODE APPROVAL' dialog box now has the 'Code' field filled with '924891841D' and the 'Issuee' field filled with 'Sambillon, Jemel'. The 'OK' and 'Cancel' buttons remain at the bottom of the dialog. The background of the dialog still features a clock face and the text 'Time to GO!'. The main window behind the dialog shows the same transaction details and financial data table.

Specify	Value	Monthly Amort.	Value
Gross Price	101,172.00	Credit Investigator	Sambillon, Jemel Muyargas
PN Value	98,172.00	Quick Match No.	C1000000U
Down Payment	3,000.00		

## 5. Successful approval

The screenshot shows the 'Credit Application Approval/Disapproval' window. The transaction is marked as 'CLOSED'. A modal message box displays 'Transaction Saved Successfully!!!' with an 'OK' button. The application details are as follows:

Application Information		Financer Information	
Transaction No.	M00119-000001	Model	TMX 125a
Name	Gabriel, Fernando Ravanzo	Term	36 Agto-Compute
Birth Date	Feb 07, 1982	Monthly Amort.	2,727.00
Birth Place	Dagupan City, Pangasinan 2400	Credit Investigator	Sambillon, Jemel Muyargas
Civil Status	Separated	Quick Match No.	C1000000U
Length of Stay			
Address	Calmay North, Dagupan City, Pangasinan 2400		
Former Address			
Town/City			

Additional fields visible include: Application Date (Feb 08, 2019), Application Type (New Customer), Unit Applied (Motorcycle), Specity (Honda), Gross Price (101,172.00), PN Value (98,172.00), and Down Payment (3,000.00).

The screenshot shows the 'Credit Application Approval/Disapproval' window with the transaction marked as 'APPROVED'. The application details are as follows:

Application Information		Financer Information	
Transaction No.	M00119-000001	Model	TMX 125a
Name	Gabriel, Fernando Ravanzo	Term	36 Agto-Compute
Birth Date	Feb 07, 1982	Monthly Amort.	2,727.00
Birth Place	Dagupan City, Pangasinan 2400	Credit Investigator	Sambillon, Jemel Muyargas
Civil Status	Separated	Quick Match No.	C1000000U
Length of Stay			
Address	Calmay North, Dagupan City, Pangasinan 2400		
Former Address			
Town/City			

Additional fields visible include: Application Date (Feb 08, 2019), Application Type (New Customer), Unit Applied (Motorcycle), Specity (Honda), Gross Price (101,172.00), PN Value (98,172.00), and Down Payment (3,000.00).

Please inform the MIS Support Team for any errors encountered on the system. Thank you and God bless.