

How to use Required Document Type Node

Create Required Document Type
Edit Required Document Type
Delete Required Document Type

**CREATE REQUIRED DOCUMENT
TYPE**

CREATE REQUIRED DOCUMENT TYPE

Navigation Area

- Lending Application
 - Loan Products
 - Customers
 - Loan Applications
 - Loan Accounts
 - Loan Restructure
 - Additional Loan
 - Advance Change
 - Disbursements
 - Receipts
 - Cheques
 - Cheque Editor
 - Payment
- Settings
 - Employees
 - Contacts
 - Banks
 - User Accounts
 - Holidays
 - Cash On Vault
 - Currency Conversion
- Types
 - Customer Classification
 - Required Document Type**
 - System Settings
- Reports

Required Document Type

Required Document Types List



[-] Delete | [+] Open | **[+] Add**

2) Click the 'Add' button




Name
3 Months Payslip
Affidavit Of Non-Tenancy (For Agricultural Land Only)
Certificate of Employment
Certification
Community Tax (Res. Cert.) Photocopy
Land Title (Owner's Copy)
Sketch/Location Plan
T. I. N. No.
Tax Clearance
Two (2) Valid ID With Picture

1) Click the Required Document Type Node under the Types Node

CREATE REQUIRED DOCUMENT TYPE

Required Document Type  Add Required Document Type 

Required Document Type Details

 Save  Cancel 

*Name:

Form is valid.

3) Fill in the required field marked with '*'

CREATE REQUIRED DOCUMENT TYPE



Status

Required document type was successfully created.




OK

DONE !!!


CREATE REQUIRED DOCUMENT TYPE

 Required Document Type 

Required Document Types List

 Delete |  Open |  Add

Name
3 Months Payslip
Affidavit Of Non-Tenancy (For Agricultural Land Only)
Certificate of Employment
Certification
Community Tax (Res. Cert.) Photocopy
Land Title (Owner's Copy)
Required Document Type Name
Sketch/Location Plan
T. I. N. No.
Tax Clearance
Two (2) Valid ID With Picture



The newly created required document type will then be added to the list.

**EDIT REQUIRED DOCUMENT
TYPE**

EDIT REQUIRED DOCUMENT TYPE

The screenshot displays a software interface with a navigation area on the left and a main content area on the right.

Navigation Area:

- Lending Application
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 - Disbursements
 - Receipts
 - Cheques
 - Cheque Editor
 - Payment
- Settings
 - Employees
 - Contacts
 - Banks**
 - User Accounts
 - Holidays
 - Cash On Vault
 - Currency Conversion
 - Types
 - Customer Classification
 - Required Document Type**
 - System Settings
- Reports

Required Document Type

Required Document Types List

Buttons: Delete, Open, Add

3) Click the Open button

Name
3 Months Payslip
Affidavit Of Non-Tenancy (For Agricultural Land Only)
Certificate of Employment
Certification
Community Tax (Res. Cert.) Photocopy
Land Title (Owner's Copy)
Required Document Type Name
Sketch/Location Plan
T. I. N. No.
Tax Clearance
Two (2) Valid ID With Picture

2) Select the record you want to edit


1) Click the Required Document Type Node under the Types Node

EDIT REQUIRED DOCUMENT TYPE

Required Document Type

Update Required Document Type

Required Document Type Details

 Edit

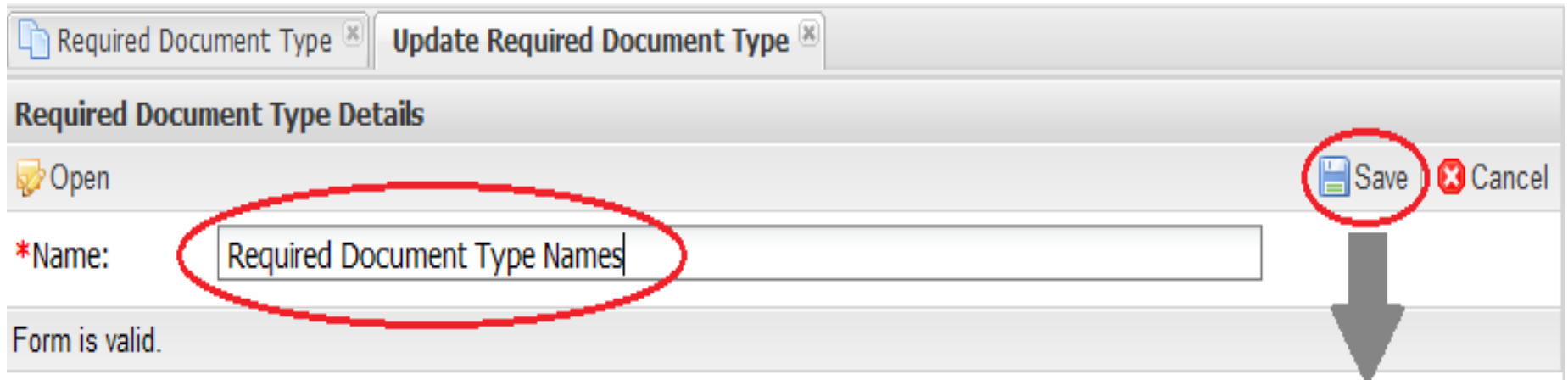
4) Click the Edit button to update the name

*Name:

Required Document Type Name

Currently in View Mode

EDIT REQUIRED DOCUMENT TYPE



Required Document Type [X] Update Required Document Type [X]

Required Document Type Details

Open

*Name: Required Document Type Names



Form is valid.

Save [X] Cancel




5) Update the Name field

6) Click the Save button


EDIT REQUIRED DOCUMENT TYPE

 Required Document Type 

Required Document Types List

 Delete |  Open |  Add

Name
3 Months Payslip
Affidavit Of Non-Tenancy (For Agricultural Land Only)
Certificate of Employment
Certification
Community Tax (Res. Cert.) Photocopy
Land Title (Owner's Copy)
Required Document Type Names
Sketch/Location Plan
T. I. N. No.
Tax Clearance
Two (2) Valid ID With Picture



The page will then be redirected to the required document type list with the updated record

**DELETE REQUIRED DOCUMENT
TYPE**

DELETE REQUIRED DOCUMENT TYPE

Navigation Area

- Lending Application
 - Loan Products
 - Customers
 - Loan Applications
 - Loan Accounts
 - Loan Restructure
 - Additional Loan
 - Advance Change
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 - Cheques
 - Cheque Editor
 - Payment
- Settings
 - Employees
 - Contacts
 - Banks
 - User Accounts
 - Holidays
 - Cash On Vault
 - Currency Conversion
 - Types
 - Customer Classification
 - Required Document Type**
 - System Settings
- Reports

Required Document Type

Required Document Types List

Name
3 Months Payslip
Affidavit Of Non-Tenancy (For Agricultural Land Only)
Certificate of Employment
Certification
Community Tax (Res. Cert.) Photocopy
Land Title (Owner's Copy)
Required Document Type Names
Sketch/Location Plan
T. I. N. No.
Tax Clearance
Two (2) Valid ID With Picture

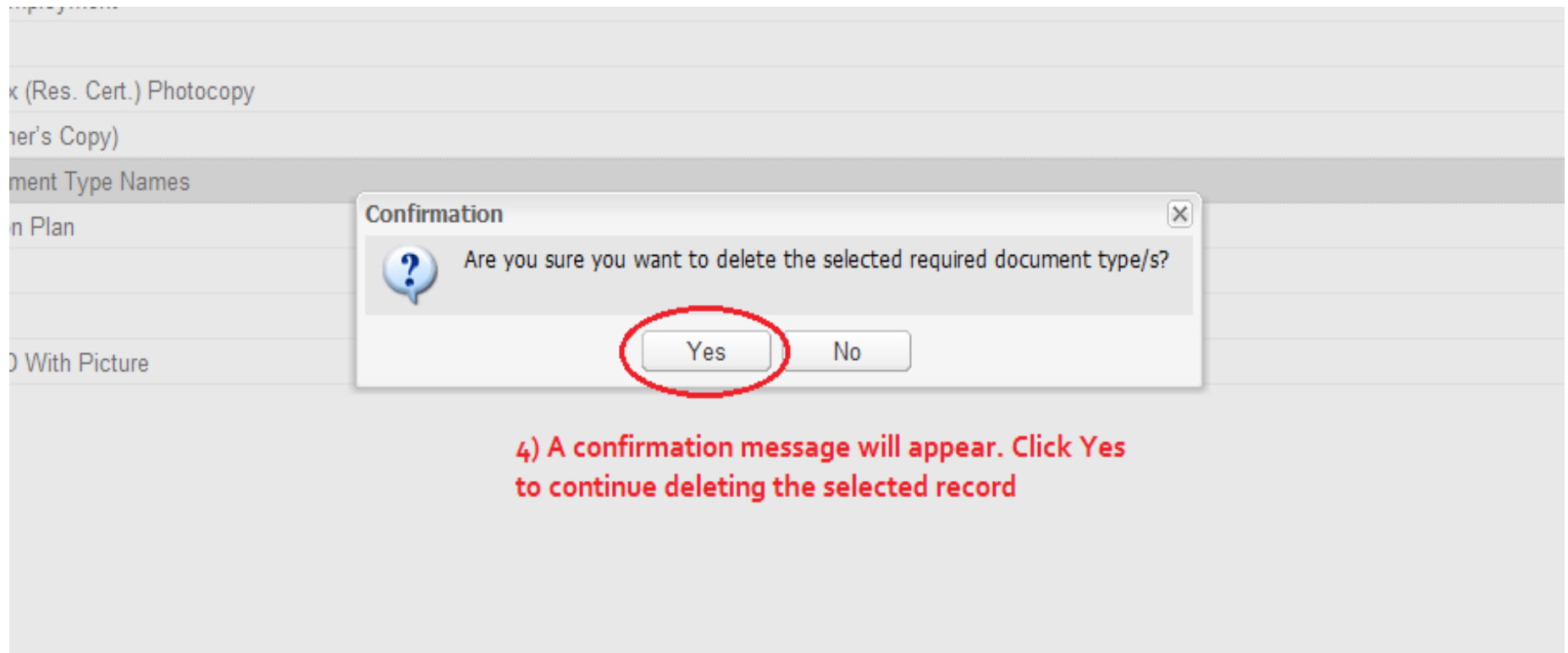
3) Click the Delete button

2) Select the record you want to delete

1) Click the Required Document Type Node under the Types Node

Note: Only document types which are not currently used by a loan application can be deleted. An alert message will appear if a user attempts to delete a used document type.

DELETE REQUIRED DOCUMENT TYPE



DELETE REQUIRED DOCUMENT TYPE

