

How to CREATE Customer

CREATE CUSTOMER

The screenshot shows a web application interface with a navigation area on the left and a main content area on the right. The navigation area contains a tree view with the following items: Lending Application, Loan Products, Customers (highlighted with a red circle), Loan Applications, Loan Accounts, Loan Res, Additional, Loan Disbursement Voucher, Disbursements, Billing, Receipts, Cheques, Cheque Editor, Payment, Settings, Employees, and Contacts. The main content area has a tab bar with 'Home' and 'Customers' (selected). Below the tab bar is a toolbar with 'Delete', 'Open', and 'Add' (highlighted with a red circle). The 'Add' button has a dropdown menu with 'Person' selected. Below the toolbar is a table with the following data:

CustomerID		
4	dela Cruz, Juan	B, C,
9	San Miguel, Juana	B, C,
14	San Pedro, Diego	B, C,

1. Click the Customers node in the Navigation Area


2. Click the Add button and select Person to add a customer.

CREATE CUSTOMER

Home Customers **Add Customer** The Add Customer tab will open containing the form to be filled up.

Save Close

Basic Information ID's Contact Information Employment Information Other Sources of Income Spouse Information R



*Name:

*District:

Station Number:

Customer Status:

*Customer Type:

Gender: ☒ Female ☐ Male

*Birthdate:

BirthPlace:

Mother's Maiden Name:

*Marital Status:

CREATE CUSTOMER (Basic Information)

The screenshot shows a web application window titled 'Add Customer'. The 'Basic Information' tab is selected and highlighted with a red circle. The form contains various fields for customer data, including Name, District, Station Number, Customer Status, Customer Type, Gender, Birthdate, BirthPlace, Mother's Maiden Name, Marital Status, Number Of Dependents, Educational Attainment, Home Ownership, Resident Since, Nationality, TIN, and CTC Number. The 'Name' and 'District' fields are highlighted with a red oval, and a red arrow points to a text box containing instructions.

Basic Information | ID's | Contact Information | Employment Information | Other Sources of Income | Spouse Information | Remarks

Save | Close

**1. Fill up first the Name and District fields.
Please refer to Miscellaneous folder on how
to fill up using the Browse button.**

**Fill up the Basic Information
tab. This tab contains the
personal information of the
customer.**

CREATE CUSTOMER (Basic Information)

Home Customers Add Customer

Save Close

Basic Information ID's Contact Information Employment Information Other Sources of Income Spouse Information Remarks

***Name:** Silang, Gabriela

***District:** Rizal District

Station Number: 1

Customer Status: New

***Customer Type:** **Teacher** **Others**

Gender:

***Birthdate:**

BirthPlace:

Mother's Maiden Name:

***Marital Status:**

***Number Of Dependents:**

***Educational Attainment:**

***Home Ownership:**

***Resident Since:**

Nationality:

TIN:

CTC Number:

Date Issued:

Place Issued:

Click the Browse button to add a picture for the customer.

2. Choose the type of the customer. There are two choices, teacher and non-teacher.


Once added, click the Upload button.

NOTE: See the MISCELLANEOUS Folder on how to upload an image.


Please fill out the form.

CREATE CUSTOMER

(Basic Information)



Koala.jpg

 Browse...

Upload

Gender: ☒ Female ☐ Male

*Birthdate: 10/8/1992

BirthPlace:

Mother's Maiden Name:

*Marital Status: Single

*Number Of Dependents: 1

*Educational Attainment: College Undergraduate

*Home Ownership: Owned

*Resident Since: 8/14/2007

Nationality:

TIN: - - -

CTC Number:

Date Issued:

Place Issued:

Credit Limit: 500,000.00

3. Fill up the rest of the required fields.

The credit limit tells the maximum loanable amount of the customer. Since this field is not required, when not filled up, the customer's credit limit is automatically set to unlimited.


Please fill out the form.

CREATE CUSTOMER (Basic Information)

Home Customers Add Customer

Save Close

Basic Information ID's Contact Information Employment Information Other Sources of Income **Spouse Information** Remarks

 Koala.jpg Browse...

Upload

*Name: Silang, Gabriela Browse..

*District: Rizal District Browse..

Station Number: 1

Customer Status: New

*Customer Type: Teacher

Gender:

*Birthdate: **Setting the Marital Status to 'Single' disables the Spouse Information tab.**

BirthPlace: ...

Mother's Maiden Name:

***Marital Status: Single**

*Number Of Dependents: 1


*Educational Attainment: College Undergraduate

CREATE CUSTOMER (Basic Information)

Home Customers Add Customer

Save Close

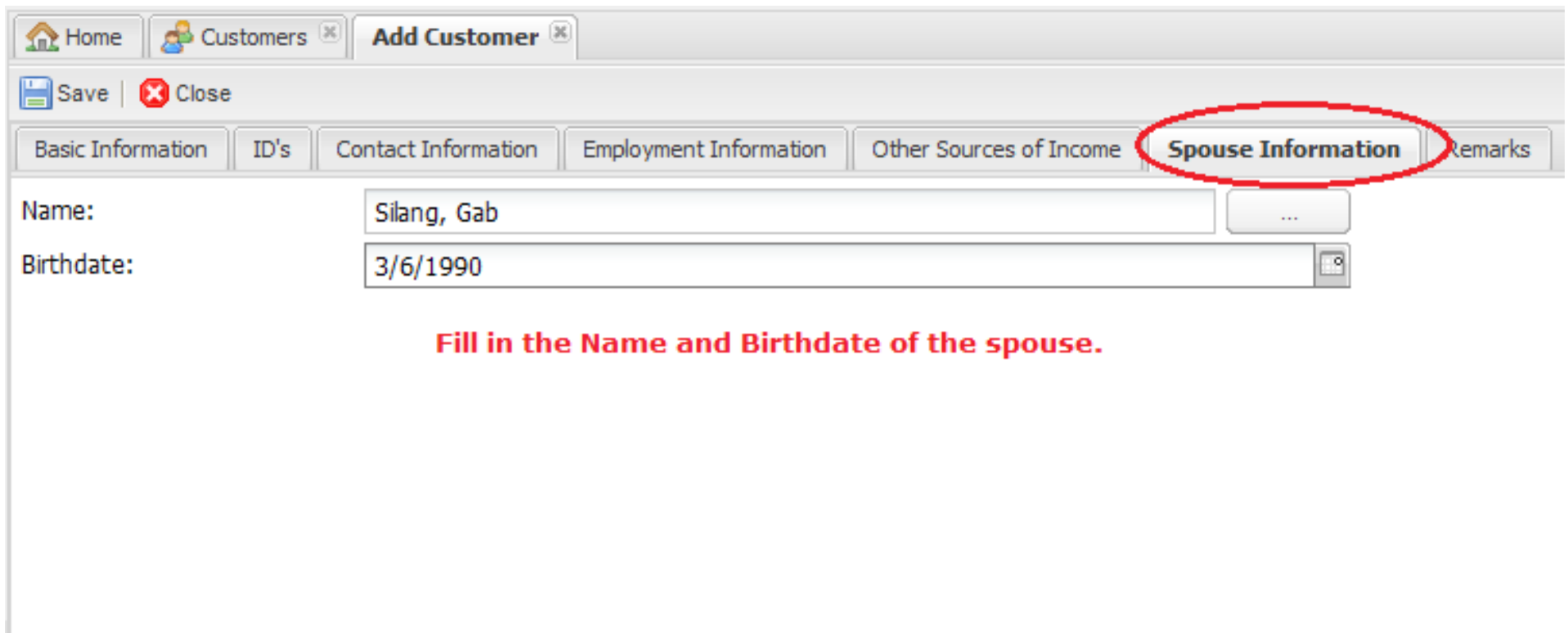
Basic Information ID's Contact Information Employment Information Other Sources of Income **Spouse Information** Remarks


Koala.jpg Browse...
Upload

*Name: Silang, Gabriela Browse..
*District: Rizal District Browse..
Station Number: 1
Customer Status: New
*Customer Type: [Dropdown]
Gender: [Dropdown]
*Birthdate: 10/8/1998
BirthPlace: [Dropdown]
Mother's Maiden Name: [Text]
***Marital Status: Married**
*Number Of Dependents: 1
*Educational Attainment: College Undergraduate

Only the Marital Status of 'Married' enables the Spouse Information tab and sets it as required.

CREATE CUSTOMER (Spouse Information)



The screenshot shows a software window titled "Add Customer" with a tabbed interface. The "Spouse Information" tab is selected and highlighted with a red oval. The window includes a "Save" button and a "Close" button. The "Spouse Information" tab contains two input fields: "Name:" with the value "Silang, Gab" and "Birthdate:" with the value "3/6/1990".

Home Customers Add Customer

Save Close

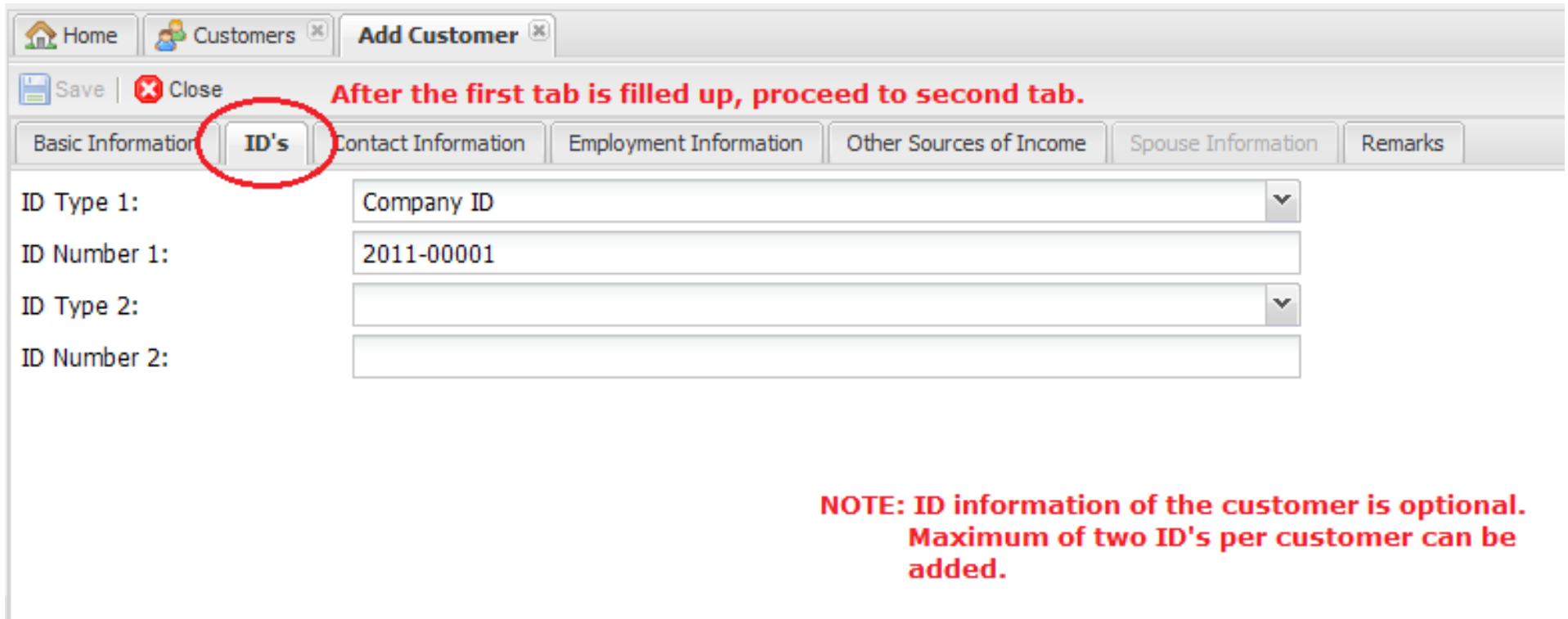
Basic Information ID's Contact Information Employment Information Other Sources of Income **Spouse Information** Remarks

Name: Silang, Gab

Birthdate: 3/6/1990

Fill in the Name and Birthdate of the spouse.

CREATE CUSTOMER (IDs)



The screenshot shows a web application window titled 'Add Customer'. The window has a top navigation bar with 'Home', 'Customers', and 'Add Customer' tabs. Below the navigation bar is a toolbar with 'Save' and 'Close' buttons. A red instruction text reads: 'After the first tab is filled up, proceed to second tab.' The main content area has several tabs: 'Basic Information', 'ID's', 'Contact Information', 'Employment Information', 'Other Sources of Income', 'Spouse Information', and 'Remarks'. The 'ID's' tab is selected and circled in red. The form fields for the 'ID's' tab are as follows:

Field Label	Field Value
ID Type 1:	Company ID
ID Number 1:	2011-00001
ID Type 2:	
ID Number 2:	

NOTE: ID information of the customer is optional. Maximum of two ID's per customer can be added.

CREATE CUSTOMER (Address)

Home Customers Add Customer

Save Close

The Contact Information tab is required.

Basic Information ID's **Contact Information** Employment Information Other Sources of Income Spouse Information Remarks

*Primary Home Address:

Secondary Home Address:

Cellphone Number: - -

Telephone Number: - -

Primary Email Address:

Secondary Email Address:

Click the Browse button to add the address.

Address Details

Street Address:

*Barangay: San Roque

City or Municipality

☐ Municipality ☒ City Mandaue

Province:

*Country: Philippines

*Postal Code: 6014

Form is valid.

Click the Done button to add the address.

After clicking the Browse button, a window will pop-up for you to fill the address. Refer to the MISCELLANEOUS Folder on how to add an address.

CREATE CUSTOMER (Address)

The screenshot shows a web application window titled 'Add Customer'. It has a navigation bar with 'Home', 'Customers', and 'Add Customer' tabs. Below the navigation bar are 'Save' and 'Close' buttons. The main content area has several tabs: 'Basic Information', 'ID's', 'Contact Information' (which is selected), 'Employment Information', 'Other Sources of Income', 'Spouse Information', and 'Remarks'. Under the 'Contact Information' tab, there are several input fields. The first field, labeled '*Primary Home Address:', contains the text 'San Roque, Mandaue, Philippines 6014' and is circled in red. To its right is a button with three dots. Below this is a field for 'Secondary Home Address:' with a similar button. Further down are fields for 'Cellphone Number:' and 'Telephone Number:', each with a '+63' prefix and a hyphen separator. At the bottom are fields for 'Primary Email Address:' and 'Secondary Email Address:'. A red text note on the right side of the form states: 'The address is then field with your input.'

Home Customers Add Customer

Save Close

Basic Information ID's **Contact Information** Employment Information Other Sources of Income Spouse Information Remarks

*Primary Home Address: San Roque, Mandaue, Philippines 6014 ...

Secondary Home Address: ...

Cellphone Number: +63 - -

Telephone Number: +63 - -

Primary Email Address:

Secondary Email Address:

The address is then field with your input.

NOTE: The rest of the fields aside from the Primary Home Address is optional.

CREATE CUSTOMER (Employment Information)

Home Customers Add Customer

Save Close

The Employment Information tab is optional.

Basic Information ID's Contact Information **Employment Information** Other Sources of Income Spouse Information Remarks

Employer: Browse..

Employment Address:

Telephone Number: - -

Fax Number: - -

Email Address:

Employee ID Number:

Position:

Employment Status:

Salary:

SSS Number:

GSIS Number:

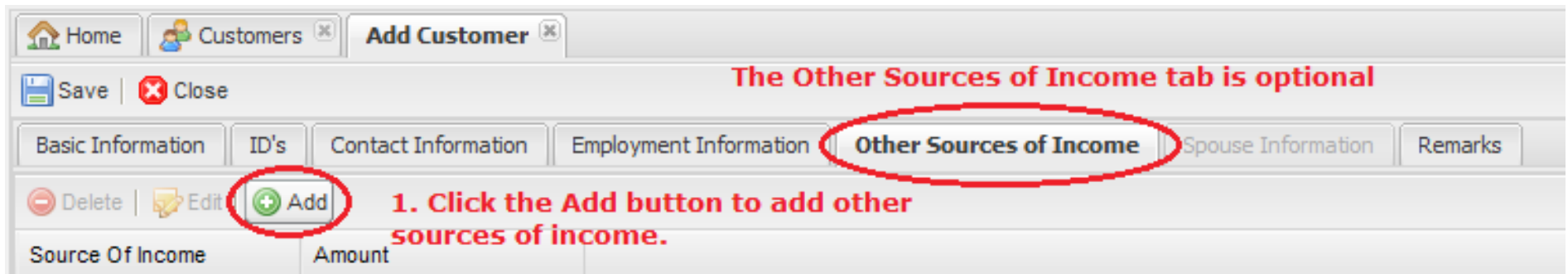
OWA Number:

PHIC Number:

Fill in the Employment Information tab if the customer is currently employed. If not, then leave this tab empty and proceed to the next tab.

CREATE CUSTOMER

(Other Sources of Income - ADD)



The screenshot shows the 'Add Customer' window with the 'Other Sources of Income' tab selected. The 'Add' button is circled in red. A red arrow points from the 'Add' button to the pop-up window below.

Home Customers Add Customer

Save Close

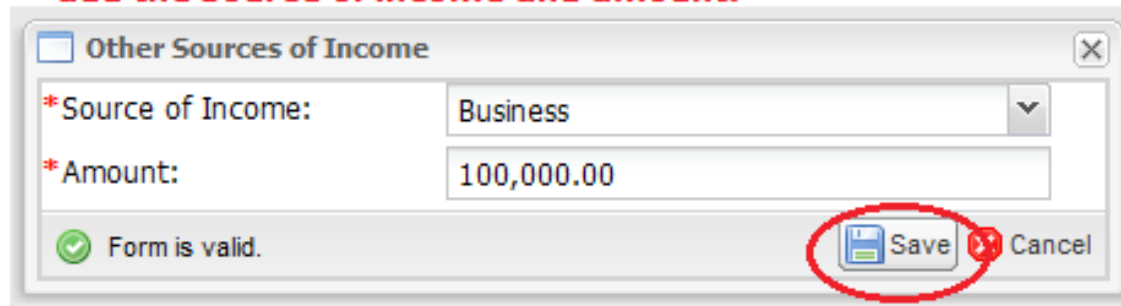
Basic Information ID's Contact Information Employment Information **Other Sources of Income** Spouse Information Remarks

Delete Edit **Add**

1. Click the Add button to add other sources of income.

Source Of Income	Amount
------------------	--------

Clicking the Add button opens a pop-up window for you to add the source of income and amount.



The screenshot shows the 'Other Sources of Income' pop-up window. The 'Source of Income' dropdown is set to 'Business' and the 'Amount' is '100,000.00'. The 'Save' button is circled in red.

Other Sources of Income

*Source of Income: Business

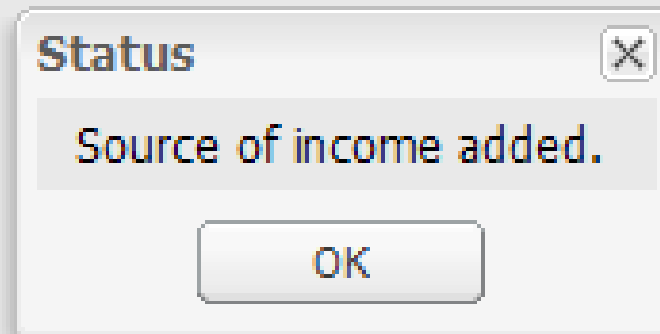
*Amount: 100,000.00

Form is valid.

Save Cancel

Click the Save button to add the item to the list.

CREATE CUSTOMER (Other Sources of Income)



**An alert message will inform you
that the item is added on the list.**

CREATE CUSTOMER (Other Sources of Income)

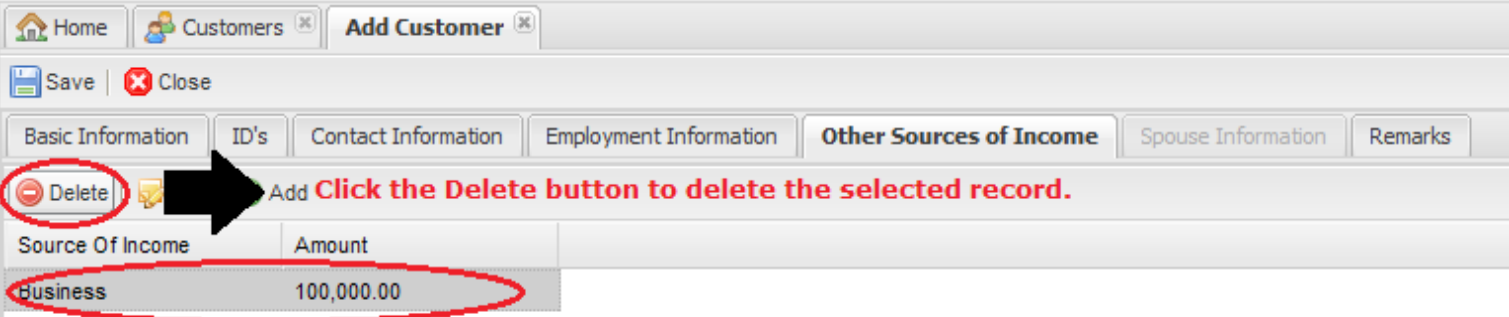
The screenshot shows a software window titled "Add Customer" with tabs for "Home", "Customers", and "Add Customer". Below the tabs are buttons for "Save" and "Close". A series of tabs for customer information are visible: "Basic Information", "ID's", "Contact Information", "Employment Information", "Other Sources of Income" (which is selected), "Spouse Information", and "Remarks". Below these tabs are buttons for "Delete", "Edit", and "Add". A table with two columns, "Source Of Income" and "Amount", is displayed. The first row of the table, containing "Business" and "100,000.00", is circled in red.

Source Of Income	Amount
Business	100,000.00

The source of income is added in the list.

CREATE CUSTOMER

(Other Sources of Income - DELETE)



Home Customers Add Customer

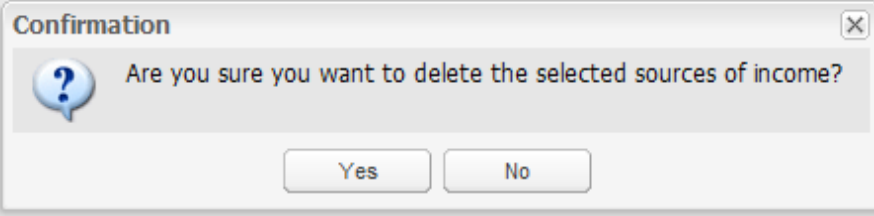
Save Close

Basic Information ID's Contact Information Employment Information **Other Sources of Income** Spouse Information Remarks

Delete Add Click the Delete button to delete the selected record.

Source Of Income	Amount
Business	100,000.00

Selecting a source of income record in the list allows you to Delete/Edit the record.



Confirmation

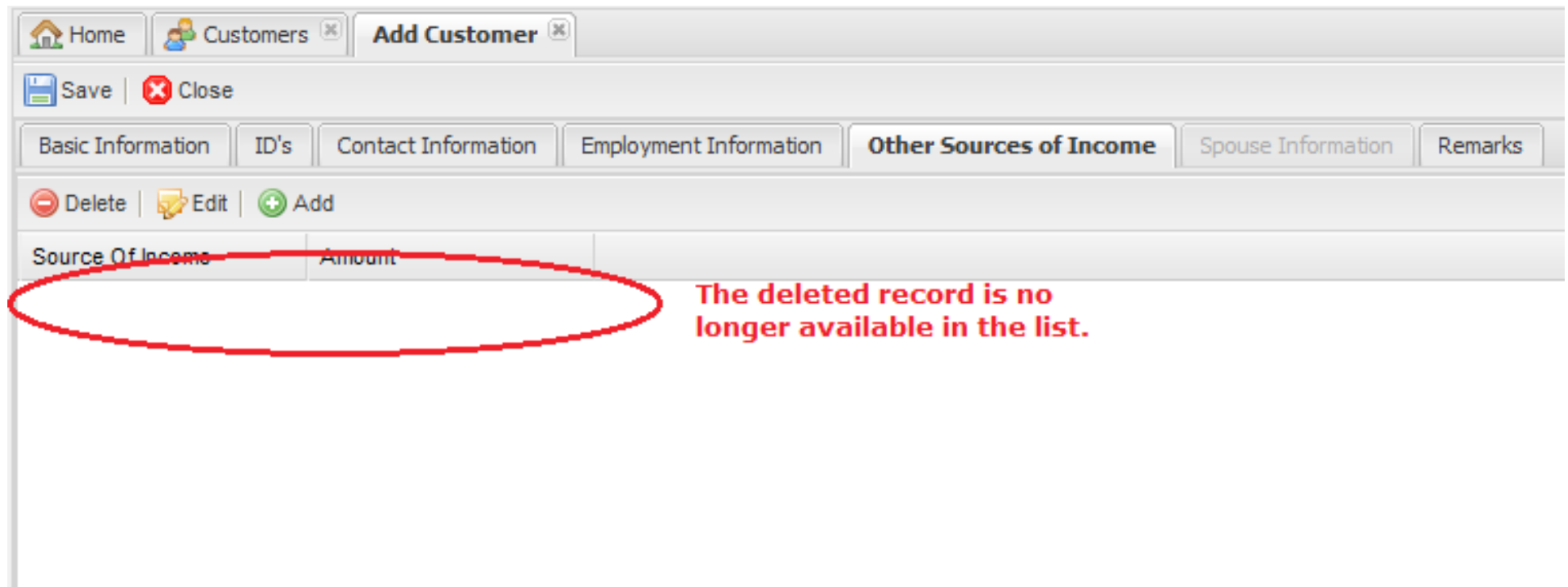
Are you sure you want to delete the selected sources of income?

Yes No

A confirmation message will ask you to confirm the deletion of the source of income. Click Yes to proceed and No otherwise.

CREATE CUSTOMER

(Other Sources of Income - DELETE)



Home Customers Add Customer

Save Close

Basic Information ID's Contact Information Employment Information **Other Sources of Income** Spouse Information Remarks

Delete Edit Add

Source Of Income	Amount
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The deleted record is no longer available in the list.

CREATE CUSTOMER

(Other Sources of Income - EDIT)

Home Customers Add Customer

Save Close

Basic Information ID's Contact Information Employment Information **Other Sources of Income** Spouse Information Remarks

Delete Edit Add

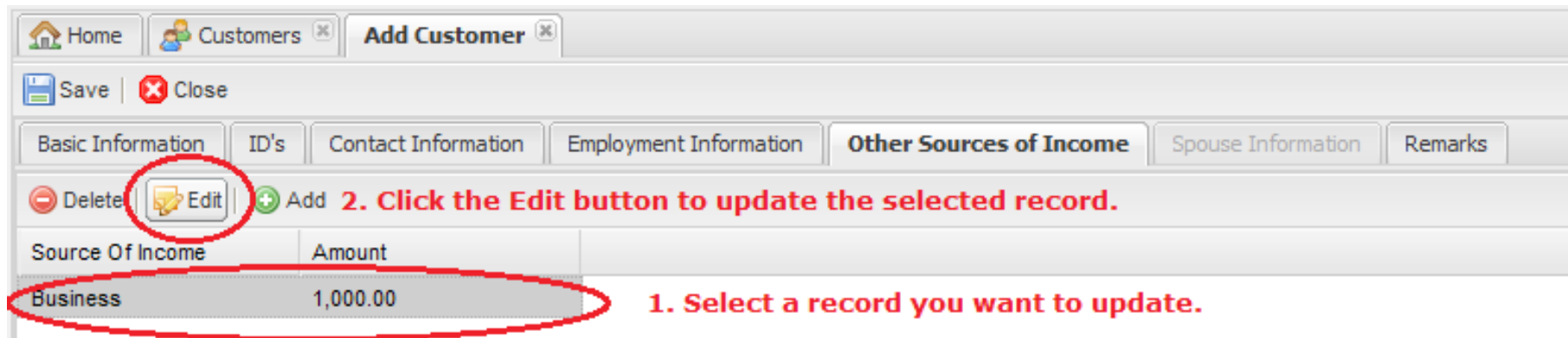
2. Click the Edit button to update the selected record.

Source Of Income	Amount
Business	1,000.00

1. Select a record you want to update.

CREATE CUSTOMER

(Other Sources of Income - EDIT)



Home Customers Add Customer

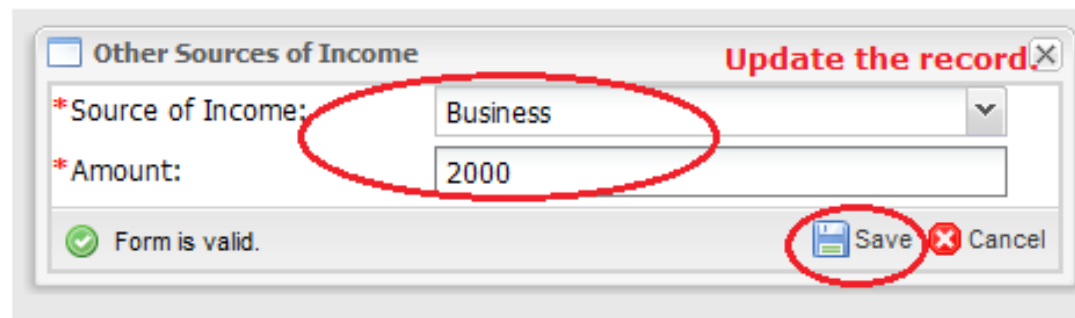
Save Close

Basic Information ID's Contact Information Employment Information **Other Sources of Income** Spouse Information Remarks

Delete Edit Add 2. Click the Edit button to update the selected record.

Source Of Income	Amount
Business	1,000.00

1. Select a record you want to update.



Other Sources of Income Update the record

*Source of Income: Business

*Amount: 2000

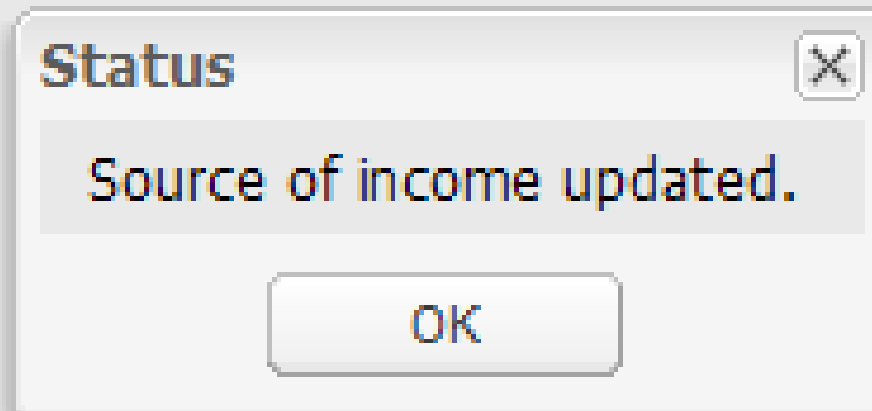
Form is valid.

Save Cancel

Click the Save button to save the changes.

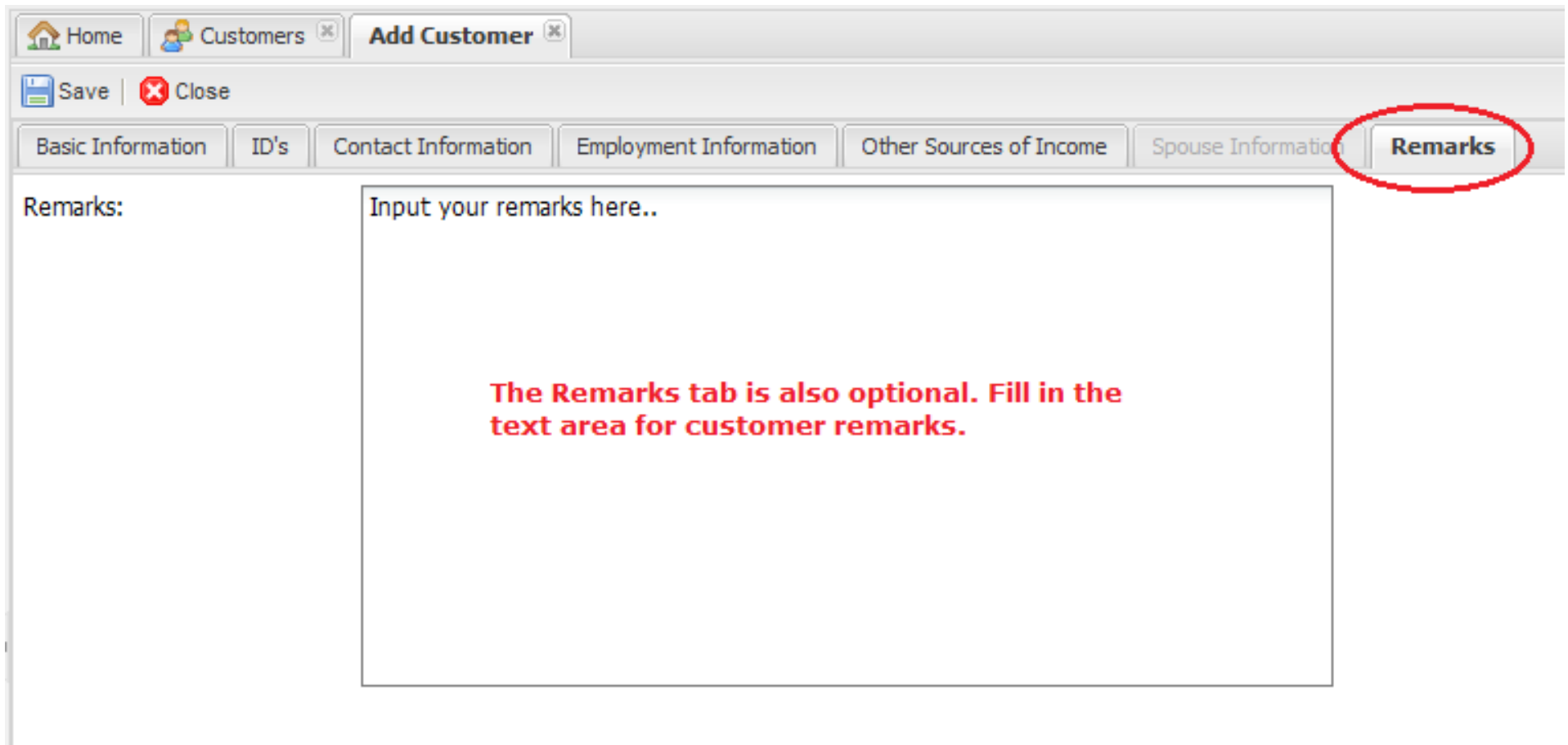
CREATE CUSTOMER

(Other Sources of Income - EDIT)



An alert message will inform you that the update was successful.

CREATE CUSTOMER (Remarks)



The screenshot shows a web application window titled 'Add Customer'. The window has a tabbed interface with the following tabs: 'Home', 'Customers', and 'Add Customer'. Below the tabs, there are 'Save' and 'Close' buttons. The 'Add Customer' tab is active, and it contains several sub-tabs: 'Basic Information', 'ID's', 'Contact Information', 'Employment Information', 'Other Sources of Income', 'Spouse Information', and 'Remarks'. The 'Remarks' tab is highlighted with a red circle. The 'Remarks' tab contains a text area with the placeholder text 'Input your remarks here..'. Below the text area, there is a red text instruction: 'The Remarks tab is also optional. Fill in the text area for customer remarks.'

Home Customers Add Customer

Save Close

Basic Information ID's Contact Information Employment Information Other Sources of Income Spouse Information **Remarks**

Remarks: Input your remarks here..

The Remarks tab is also optional. Fill in the text area for customer remarks.

CREATE CUSTOMER (Saving)

The screenshot shows a web application interface for creating a customer. The top navigation bar includes links for Home, Customers, and Add Customer. The main form is titled 'Add Customer' and contains several tabs: Basic Information, ID's, Contact Information, Employment Information, Other Sources of Income, Spouse Information, and Remarks. The 'Remarks' tab is currently selected, showing a text area for input. A red circle highlights the 'Save' button in the top left corner. A red message bar at the top right states: 'When the form is valid, click the Save button to add the customer.' A red circle highlights the 'Form is valid.' status message in the bottom left corner. A red message bar at the bottom right states: 'Once all required fields are filled up, this status message will tell you that the form is completely filled and validated.'

Home Customers Add Customer

Save Close When the form is valid, click the Save button to add the customer.

Basic Information ID's Contact Information Employment Information Other Sources of Income Spouse Information Remarks

Remarks: Input your remarks here..

Form is valid. Once all required fields are filled up, this status message will tell you that the form is completely filled and validated.

CREATE CUSTOMER (Saving)

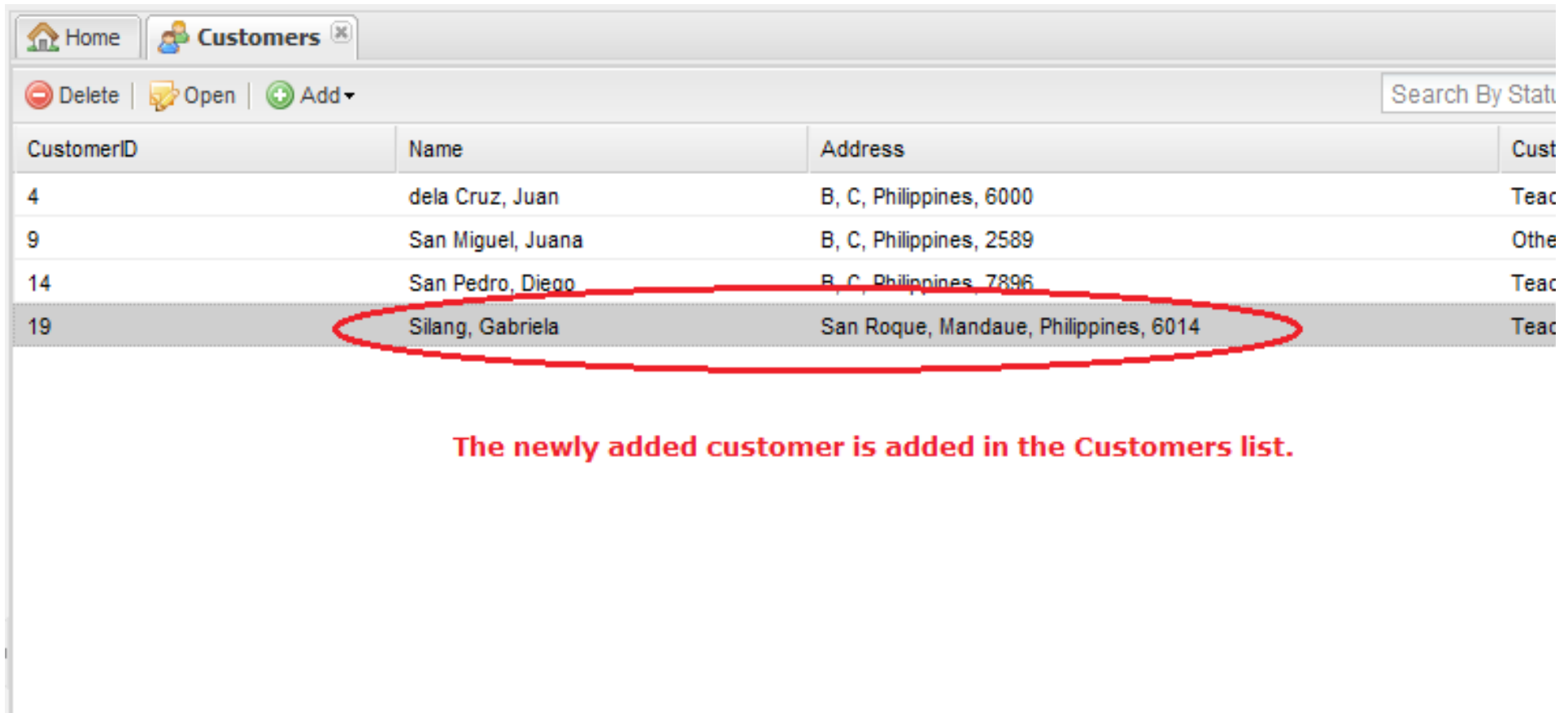
Status

Customer record was successfully created.

OK

**An alert message will inform you that
the record was successfully added.**

CREATE CUSTOMER (Saving)



CustomerID	Name	Address	Cust
4	dela Cruz, Juan	B, C, Philippines, 6000	Teac
9	San Miguel, Juana	B, C, Philippines, 2589	Othe
14	San Pedro, Diego	B, C, Philippines, 7896	Teac
19	Silang, Gabriela	San Roque, Mandaue, Philippines, 6014	Teac

The newly added customer is added in the Customers list.