

# How to Use Bank Node

- Add
- Open
- Update
- Delete
- Activate/Deactivate

# Add Bank

**Navigation Area**

- Lending Application
  - Loan Products
  - Customers
  - Loan Applications
  - Loan Accounts
  - Loan Restructure
  - Additional Loan
  - Loan Disbursement Voucher
  - Disbursements
  - Billing
  - Receipts
  - Cheques
  - Cheque Editor
  - Payment
- Settings
  - Employees
  - Contacts
  - Banks**
  - User Accounts
  - Holidays
  - Cash On Vault
  - Types

**Home Banks**

Delete Open Deactivate Activate Add

Name	Branch	Address
RCBC		Barangay, City, Philippines, 6700

**2. Click 'Add' button**

**1. Click 'Bank' Node in the 'Navigation Area'**

Navigation Area

Lending Application

Loan Products

Customers

Loan Applications

Loan Accounts

Loan Restructure

Additional Loan

Loan Disbursement Voucher

Disbursements

Billing

Receipts

Cheques

Cheque Editor

Payment

Settings

Employees

Contacts

Banks

User Accounts

Holidays

Cash On Vault

Types

HomeBanksAdd Bank

SaveClose

Bank InformationContact Information

\*Name: Metro Bank

Branch:

3. Enter Name( Required).  
Enter Branch (Optional)

**Navigation Area**

- Lending Application
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  - Customers
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  - Contacts
  - Banks**
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  - Cash On Vault
  - Types

Home Banks **Add Bank**

Save Close

**Bank Information** **Contact Information**

\*Name: Metro Bank

Branch:

4. Click 'Contact Information' tab

## MN Pamaran Lending Investors, Inc.

**Navigation Area**

- Lending Application
- Loan Products
- Customers
- Loan Applications
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- Loan Restructure
- Additional Loan
- Loan Disbursement Voucher
- Disbursements
- Billing
- Receipts
- Cheques
- Cheque Editor
- Payment
- Settings
- Employees
- Contacts
- Banks**
- User Accounts
- Holidays
- Cash On Vault
- Types
- Reports
- Daily Received And Released Report

Home Banks Add Bank

Save Close

Bank Information Contact Information

\*Address: Barangay, Lahug, Cebu, Philippines, 6000 Browse...

Business Telephone Number: +63

Business Fax Number: +63

Business Email Address:

**6. Click Save button**

**5. Input Required (Address) and Optional Fields.  
Refer to 'HowToFillAddress' tutorial to fill  
Address field.**

# Open Bank

The screenshot shows a web application interface for managing banks. The interface consists of a navigation area on the left, a top bar with tabs and action buttons, and a table of bank records.

**Navigation Area:**

- Lending Application
  - Loan Products
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  - Additional Loan
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- Billing
- Receipts
- Cheques
- Cheque Editor
- Payment
- Settings
- Employees
- Contacts
- Banks**

**Top Bar:**

- Tabs: Home, Banks (selected)
- Action Buttons: Delete, **Open** (highlighted), Deactivate, Activate, Add
- Filter By Status... (dropdown)
- Search by (input field)

**Table:**

Name	Branch	Address
Metro Bank		Barangay Lahun, Cebu, Philippines, 6000
RCBC		Barangay, City, Philippines, 6700

**Annotations:**

- 2. Click 'Open' button:** A red arrow points to the 'Open' button in the top bar.
- 1. Select Bank you want to open or update:** A red arrow points to the 'RCBC' row in the table, which is highlighted with a red oval.

# Update Bank

**Navigation Area**

- Lending Application
  - Loan Products
  - Customers
  - Loan Applications
  - Loan Accounts
  - Loan Restructure
  - Additional Loan
  - Loan Disbursement Voucher
  - Disbursements
  - Billing
  - Receipts
  - Cheques
  - Cheque Editor
  - Payment
- Settings
  - Employees
  - Contacts
  - Banks**
  - User Accounts
  - Holidays
  - Cash On Vault
  - Types

**Home** **Banks** **Update Bank**

**Edit**

**Bank Information** **Contact Information**

\*Name: RCBC

Branch:

1. Follow 'Open Bank's steps

2. Click 'Edit'

**Navigation Area**

- Lending Application
  - Loan Products
  - Customers
  - Loan Applications
  - Loan Accounts
  - Loan Restructure
  - Additional Loan
  - Loan Disbursement Voucher
  - Disbursements
  - Billing
  - Receipts
  - Cheques
  - Cheque Editor
  - Payment
- Settings
  - Employees
  - Contacts
  - Banks**
  - User Accounts
  - Holidays
  - Cash On Vault
  - Types

Home Banks **Update Bank**

Open

**Bank Information** Contact Information

\*Name: RCBC

Branch:

**3. Edit 'Bank Information' Fields**



Open

Save Close

Bank Information **Contact Information**

\*Address: Barangay, City, Philippines, 6700 Browse...

Business Telephone Number: +63

Business Fax Number: +63

Business Email Address:

4. Edit 'Contact Information' fields

5. Click Save button

# Delete Bank

The screenshot shows a web application interface for managing banks. At the top, there is a toolbar with buttons: Delete (circled in red), Open, Deactivate, Activate, and Add. To the right of the toolbar are two dropdown menus labeled 'Filter By Status...' and 'Search by...'. Below the toolbar is a table with the following columns: Name, Branch, Address, and Status.

Name	Branch	Address	Status
Metro Bank		Barangay Lahun, Cebu, Philippines, 6000	Active
RCBC		Barangay, City, Philippines, 6700	Active

Annotations on the image:

- A red circle highlights the 'Delete' button in the toolbar.
- A red oval highlights the 'RCBC' row in the table.
- A black arrow points from the 'Delete' button to the text '2. Click 'Delete' button'.
- A black arrow points from the 'RCBC' row to the text '1. Select 'Bank' to be deleted'.

Home

Banks

Delete

Open

Deactivate

Activate

Add

Filter By Status...

Search by...

Name	Address	Status
Metro Bank	Barangay, Lahug, Cebu, Philippines, 6000	Active
RCBC	Barangay, City, Philippines, 6700	Active

**Note: Banks with associated checks  
cannot be deleted**

Selected bank record cannot be deleted.

# Activate/Deactivate Bank

2. Click deactivate button to deactivate. Activate button to Activate

Name	Branch	Address	Status
Metro Bank	Barangay, Lahug, Cebu, Philippines, 6000		Active
RCBC	Barangay, City, Philippines, 6700		Active

1. To activate bank: Select bank with status: 'Inactive'

To deactivate bank: Select bank with status: 'Active'

Name	Branch	Address	Status
Metro Bank		Barangay, Lahug, Cebu, Philippines, 6000	Active
RCBC		Barangay, City, Philippines, 6700	Active

**Confirmation**

Are you sure you want to deactivate this bank record?

Yes No

3. Click Yes