HOW TO FILL UP A NAME

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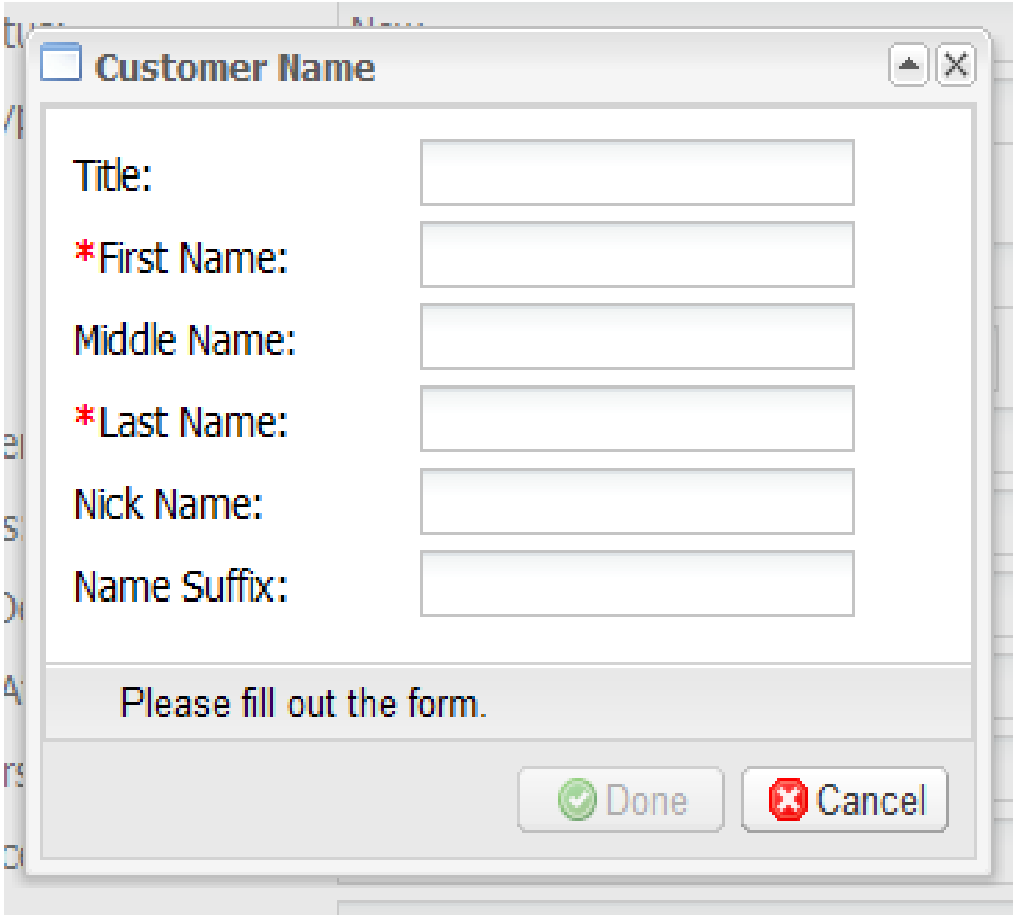
There are two ways to fill up a name in any part of the system:

1.) Using Details Pop-up Window
2.) Using the Names Pick List

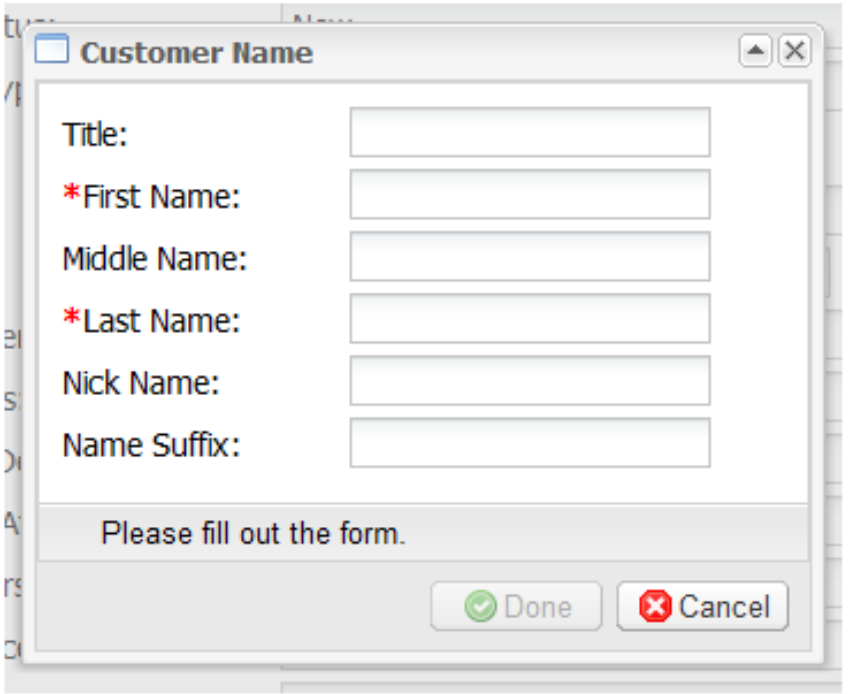
HOW TO FILL UP A NAME
using the details pop-up window

- The details pop-up window is commonly used when a user adds a new name in the system.
- Events like Add Customer and Add Employee are examples of events that use the details pop-up window.



HOW TO FILL UP A NAME
using the details pop-up window

One way to fill up a name is to click the textfield to open a details window



Once the pop-up window opens, fill up the required fields and click Done to fill the name field.

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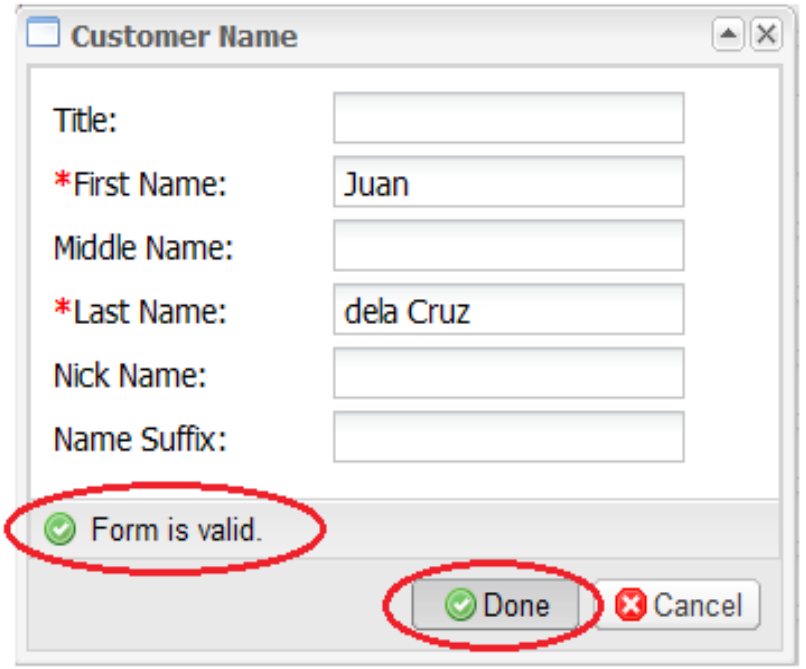
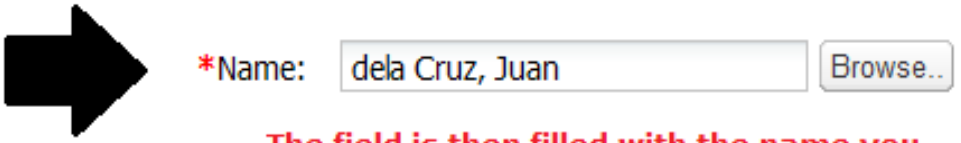
using the details pop-up window



Once the form is valid (indicating that your input is correct), you can then click the Done button to fill-up the entered name in the name field.

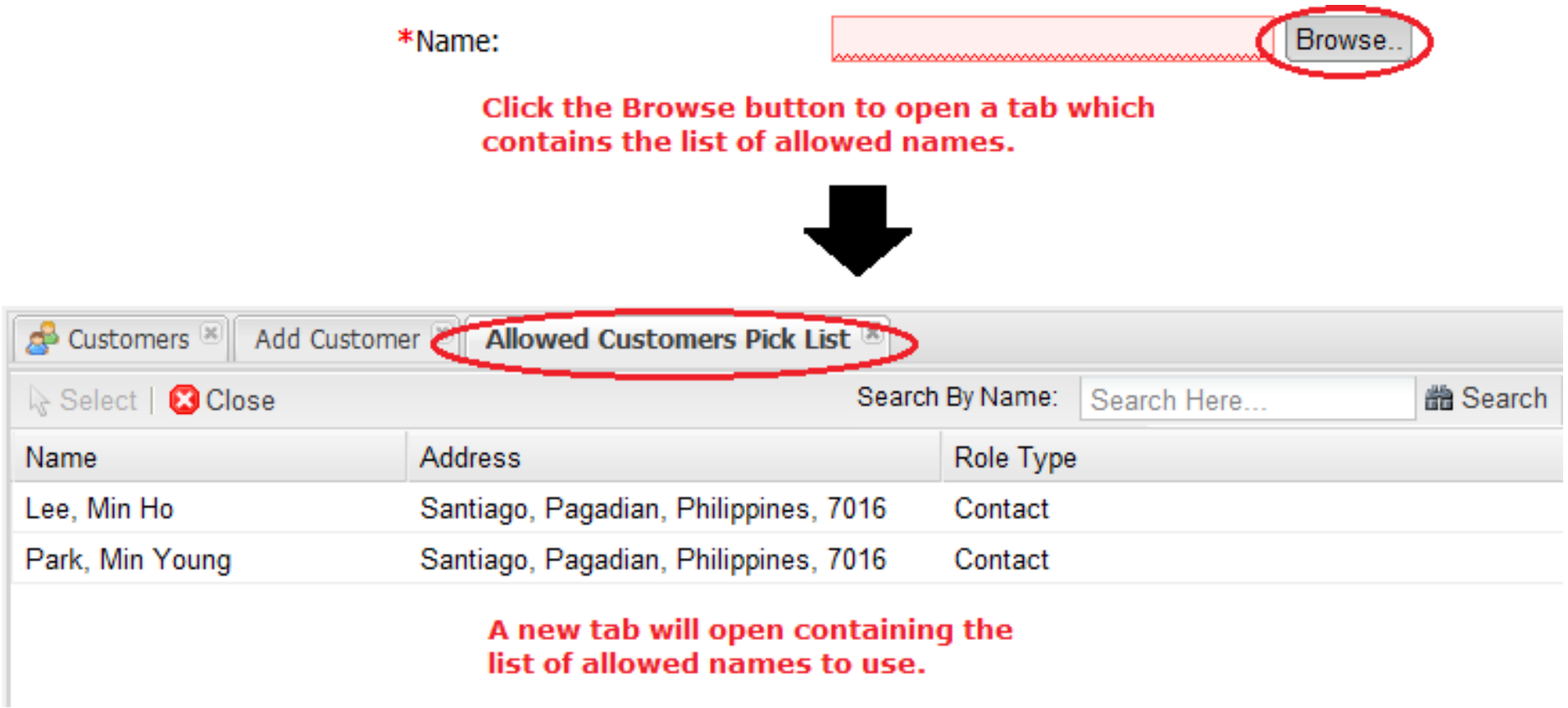


The field is then filled with the name you entered in the pop-up window.

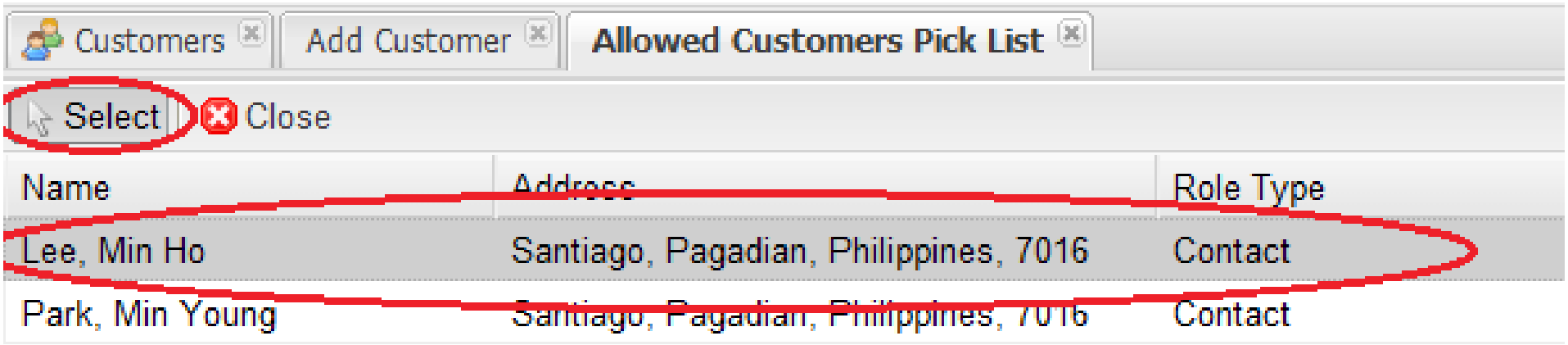
HOW TO FILL UP A NAME using the Names Pick List

- The Names Pick List allows the user to pick a name from a list of all allowed customers.
- This is commonly used when the name you want to use already exists in the system.
- Example is adding a customer from a list contacts or adding a new user account from a list of employees.

HOW TO FILL UP A NAME using the Names Pick List



HOW TO FILL UP A NAME using the Names Pick List



Select a name from the list and click the Select button to fill-up the name field using the selected name.

HOW TO FILL UP A NAME using the Names Pick List

After clicking the Select button, the name you just picked will fill-up the name field.

- Most forms in the system uses the pick list way to add names.
- Events like adding a borrower to a loan application, adding an employee to create a user account, and many more.