

How to use Contacts Node

- Create Contact (Person)
- Create Contact (Organization)
- Edit Contact (Person)
- Edit Contact (Organization)
- Delete Contact

CREATE CONTACT
(PERSON)

CREATE CONTACT (PERSON)

Navigation Area

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

Contacts

Delete | Open | **Add**

Contact ID	Person	Organization	Address
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2) Click the Person menu of the Add button
(Clicking the Add button will show the menus)

1) Click the Contacts Node under the Settings Node

CREATE CONTACT (PERSON)

Contacts x Add Person Contact x

Save | Close

Basic Information | Contact Information

*Name:

*Gender: ☒ Male ☐ Female

Birth Date:

3) Fill in the Contact Name. Click the picklist button to add the name details

5) Fill in the other required fields marked with '*'

4) Fill in the Name details then click Done

Person Name

Title:

*First Name:

*Last Name:

Middle Name:

Nick Name:

Name Suffix:

Mother's Maiden Name:

Form is valid.

Done Cancel

CREATE CONTACT (PERSON)

The image shows a software interface for adding a new contact. The main window is titled 'Add Person Contact' and has two tabs: 'Basic Information' and 'Contact Information'. The 'Contact Information' tab is selected and circled in red. A red line connects this tab to a red instruction: '6) Click the Contact Information tab'. Below the tabs, there are input fields for '*Home Address:', 'Cellphone Number:', 'Telephone Number:', and 'Email Address:'. The 'Home Address' field is highlighted with a red dashed border. A red circle with a picklist icon (three dots) is next to it, with a red instruction: '7) Fill in the necessary information. To enter the home address, click the picklist button which will show the address detail box'. A large black arrow points down from this instruction to an 'Address Details' dialog box. The dialog box contains fields for 'Street Address:', '*Barangay:' (filled with 'San Pedro'), 'City or Municipality' (with radio buttons for 'Municipality' and 'City', and 'City' selected), 'Province:', '*Country:' (filled with 'Philippines'), and '*Postal Code:' (filled with '7016'). At the bottom of the dialog, it says 'Form is valid.' and has a 'Done' button circled in red. A red instruction: '8) Fill in the address details then click Done' points to the 'Done' button with a grey arrow.

Contacts x Add Person Contact x

Save | Close

Basic Information **Contact Information** 6) Click the Contact Information tab

*Home Address: [Picklist Icon] 7) Fill in the necessary information. To enter the home address, click the picklist button which will show the address detail box

Cellphone Number: [Input Field]

Telephone Number: [Input Field]

Email Address: [Input Field]

Address Details

Street Address: [Input Field]

*Barangay: San Pedro

City or Municipality

☐ Municipality ☒ City Pagadian

Province: [Input Field]

*Country: Philippines

*Postal Code: 7016

Form is valid.

Done [Close Icon] 8) Fill in the address details then click Done

CREATE CONTACT (PERSON)

Contacts [X] Add Person Contact [X]

Save [X] Close

9) Once done filling up all the fields, click the Save button

Basic Information Contact Information

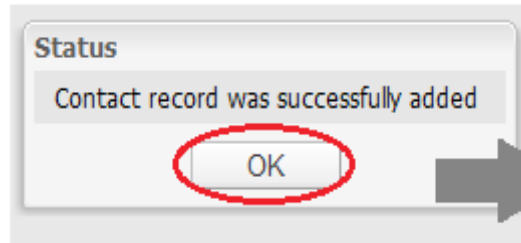
*Home Address: San Pedro, Pagadian, Philippines, 7016

Cellphone Number: +63 62

Telephone Number: +63 62

Email Address:

CREATE CONTACT (PERSON)



Done! Click OK to proceed to the updated contact list



The image shows a window titled 'Contacts'. Below the title bar is a toolbar with 'Delete' (minus icon), 'Open' (key icon), and 'Add' (plus icon). To the right is a search bar labeled 'Search by...'. Below the toolbar is a table with four columns: 'Contact ID', 'Name', 'Address', and 'Party Type'. The table contains one row of data. A red oval is drawn around the entire table.

Contact ID	Name	Address	Party Type
41	Luna, Juan	San Pedro, Pagadian, Philippines, 7016	Person

The newly added contact will then appear in the contacts list

CREATE CONTACT
(ORGANIZATION)

CREATE CONTACT (ORGANIZATION)

The screenshot displays a software interface with a 'Navigation Area' on the left and a 'Contacts' window on the right. In the 'Navigation Area', the 'Contacts' node is highlighted with a red oval. A large grey arrow points from this node to the right, accompanied by the instruction '1) Click the Contacts Node under the Settings Node'. The 'Contacts' window features a toolbar with 'Delete', 'Open', and 'Add' buttons. The 'Add' button's dropdown menu is open, showing 'Person' and 'Organization' options, with 'Organization' circled in red. A second large grey arrow points down from the 'Organization' option to the text '2) Click the Organization menu of the Add button'. Below the toolbar, a table lists contact information:

Contact ID	Person	Address
41	Organization	San Pedro, Pagadian, Philippines, 7016

CREATE CONTACT (ORGANIZATION)

Contacts [X] Add Organization Contact [X]

Save | Close

Basic Information | Contact Information

*Name: Organization

*Organization Type: External ▼

Date Established: 10/1/1997

**3) Fill in the necessary contact information
especially the fields marked with '*'**

CREATE CONTACT (ORGANIZATION)

The image shows a software interface for adding a new organization contact. The main window is titled 'Add Organization Contact' and has a 'Contact Information' tab selected. A red circle highlights this tab, with a red arrow pointing to it and the text '4) Click the Contact Information tab'. Below the tab, there are input fields for 'Home Address', 'Telephone Number', 'Fax Number', and 'Email Address'. A red dashed box surrounds the 'Home Address' field, and a red circle highlights a picklist button (three dots) next to it. A red arrow points from this button to a sub-window titled 'Address Details'. The 'Address Details' window contains fields for 'Street Address', '*Barangay' (filled with 'San Pedro'), 'City or Municipality' (with radio buttons for 'Municipality' and 'City', and 'Pagadian' entered), 'Province', '*Country' (filled with 'Philippines'), and '*Postal Code' (filled with '7016'). A green checkmark and the text 'Form is valid.' are at the bottom left of the sub-window. A red circle highlights the 'Done' button at the bottom right of the sub-window, with a red arrow pointing to it and the text '6) Fill in the address details then click Done'. A large black arrow points from the 'Address Details' sub-window back to the 'Home Address' field in the main window.

Contacts | Add Organization Contact

Save | Close

Basic Information | **Contact Information** 4) Click the Contact Information tab

*Home Address:

Telephone Number:

Fax Number:

Email Address:

5) Fill in the necessary information. To enter the home address, click the picklist button which will show the address detail box

Address Details

Street Address:

*Barangay: San Pedro

City or Municipality

☐ Municipality ☒ City Pagadian

Province:

*Country: Philippines

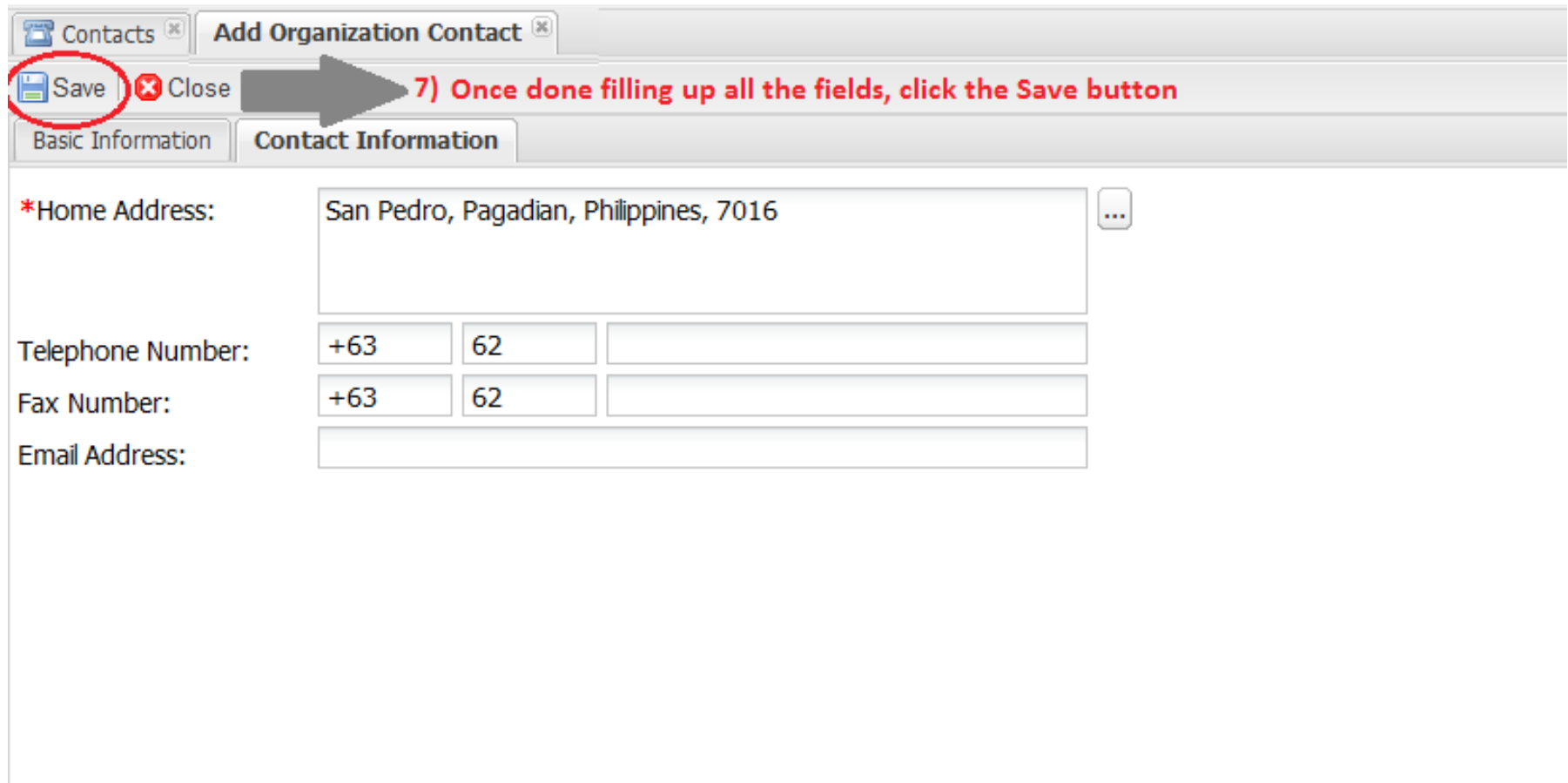
*Postal Code: 7016

Form is valid.

Done

6) Fill in the address details then click Done

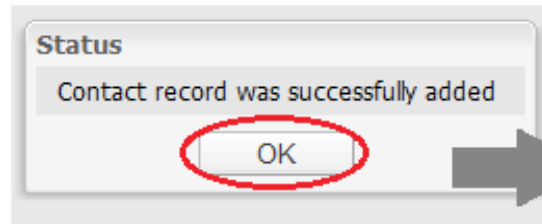
CREATE CONTACT (ORGANIZATION)



The screenshot shows a web application window titled 'Add Organization Contact'. At the top, there are two tabs: 'Contacts' and 'Add Organization Contact'. Below the tabs, there are two buttons: 'Save' and 'Close'. The 'Save' button is circled in red, and a grey arrow points from it to the right. To the right of the arrow, there is a red text annotation: '7) Once done filling up all the fields, click the Save button'. Below the buttons, there are two tabs: 'Basic Information' and 'Contact Information'. The 'Contact Information' tab is selected. The form contains the following fields:

- *Home Address: San Pedro, Pagadian, Philippines, 7016
- Telephone Number: +63 62
- Fax Number: +63 62
- Email Address:

CREATE CONTACT (ORGANIZATION)



Done! Click OK to proceed to the updated contact list



Contacts			
Delete Open Add			
Search by...			
Contact ID	Name	Address	Party Type
41	Luna, Juan	San Pedro, Pagadian, Philippines, 7016	Person
42	Organization	San Pedro, Pagadian, Philippines, 7016	Organization

The newly added contact will then appear in the contacts list

EDIT CONTACT
(PERSON)

EDIT CONTACT (PERSON)

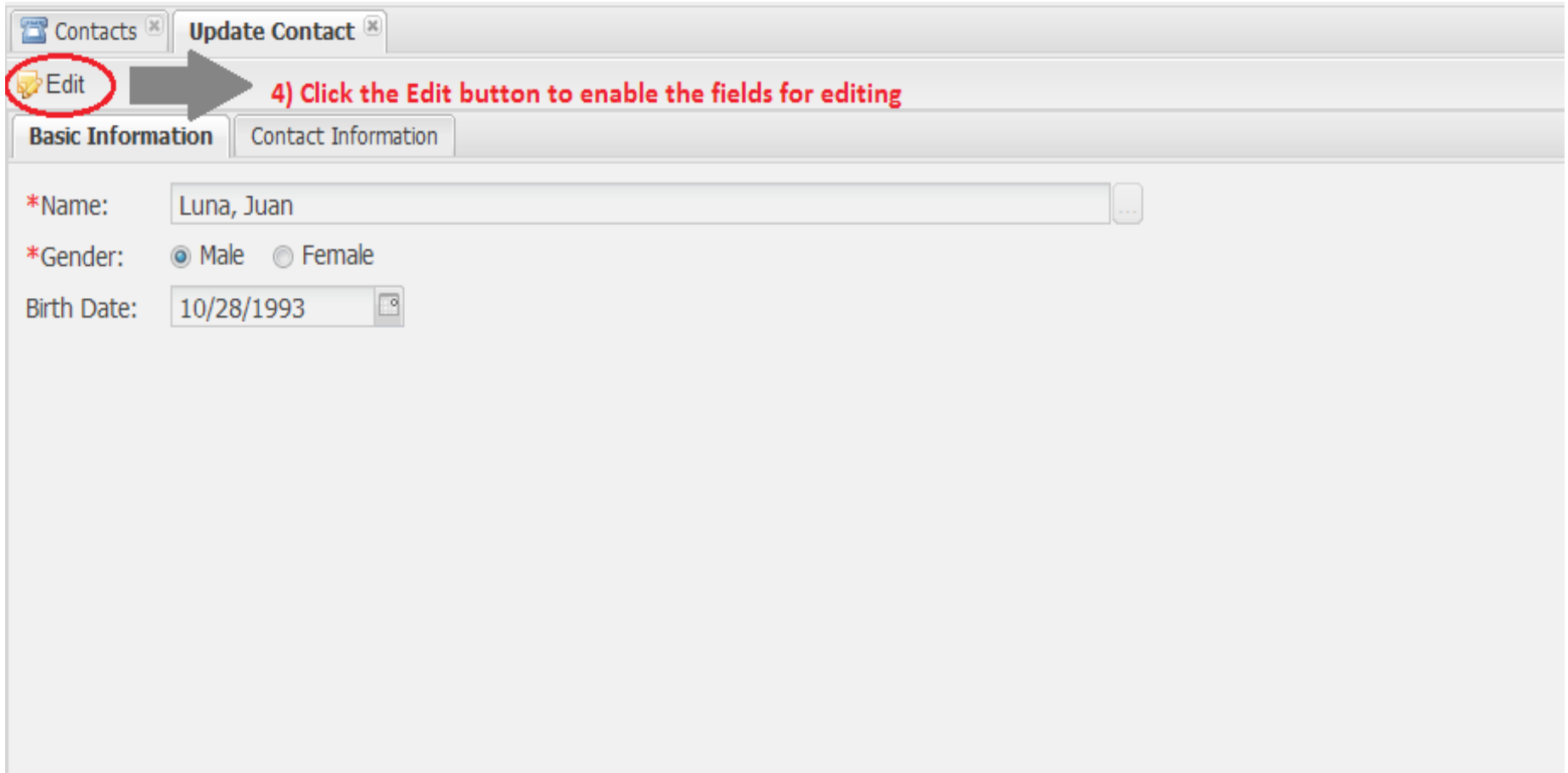
The screenshot illustrates the process of editing a contact in a software application. The interface is divided into a **Navigation Area** on the left and a main **Contacts** window on the right.

Navigation Area: Lists various application modules. The **Contacts** node under the **Settings** category is highlighted with a red circle and an arrow pointing to it, labeled **1) Click the Contacts Node under the Settings Node**.

Contacts Window: Displays a table of contacts. The **Open** button in the toolbar is highlighted with a red circle and an arrow pointing to it, labeled **3) Click the Open button**. A red oval highlights the first record in the table, labeled **2) Select the record you want to update**.

Contact ID	Name	Address	Party Type
41	Luna, Juan	San Pedro, Pagadian, Philippines, 7016	Person

EDIT CONTACT (PERSON)



Contacts [X] Update Contact [X]

Edit → 4) Click the Edit button to enable the fields for editing

Basic Information | Contact Information

*Name: Luna, Juan

*Gender: ☒ Male ☐ Female

Birth Date: 10/28/1993

EDIT CONTACT (PERSON)

Contacts Update Contact

Open Save Close

Basic Information Contact Information

*Name: Luna, Juan

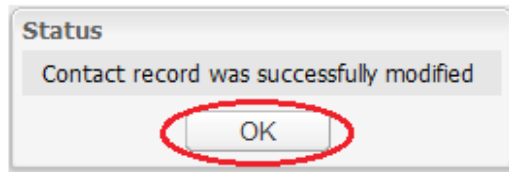
*Gender: ☒ Male ☐ Female

Birth Date: 10/28/1993

5) Start updating the contact's record. For instructions on how to manipulate each tab, please refer to How To Create Contact (Person)

6) After all changes have been made, click the Save button

EDIT CONTACT (PERSON)



Done! Click OK to proceed to the updated contact list



Contact ID	Name	Address	Party Type
41	Luna, Juan	San Pedro, Pagadian, Philippines, 7016	Person

The selected record will then be updated on the list

EDIT CONTACT
(ORGANIZATION)

EDIT CONTACT (ORGANIZATION)

The screenshot illustrates the process of editing a contact organization within a financial application. The interface is divided into a left-hand 'Navigation Area' and a right-hand 'Contacts' window.

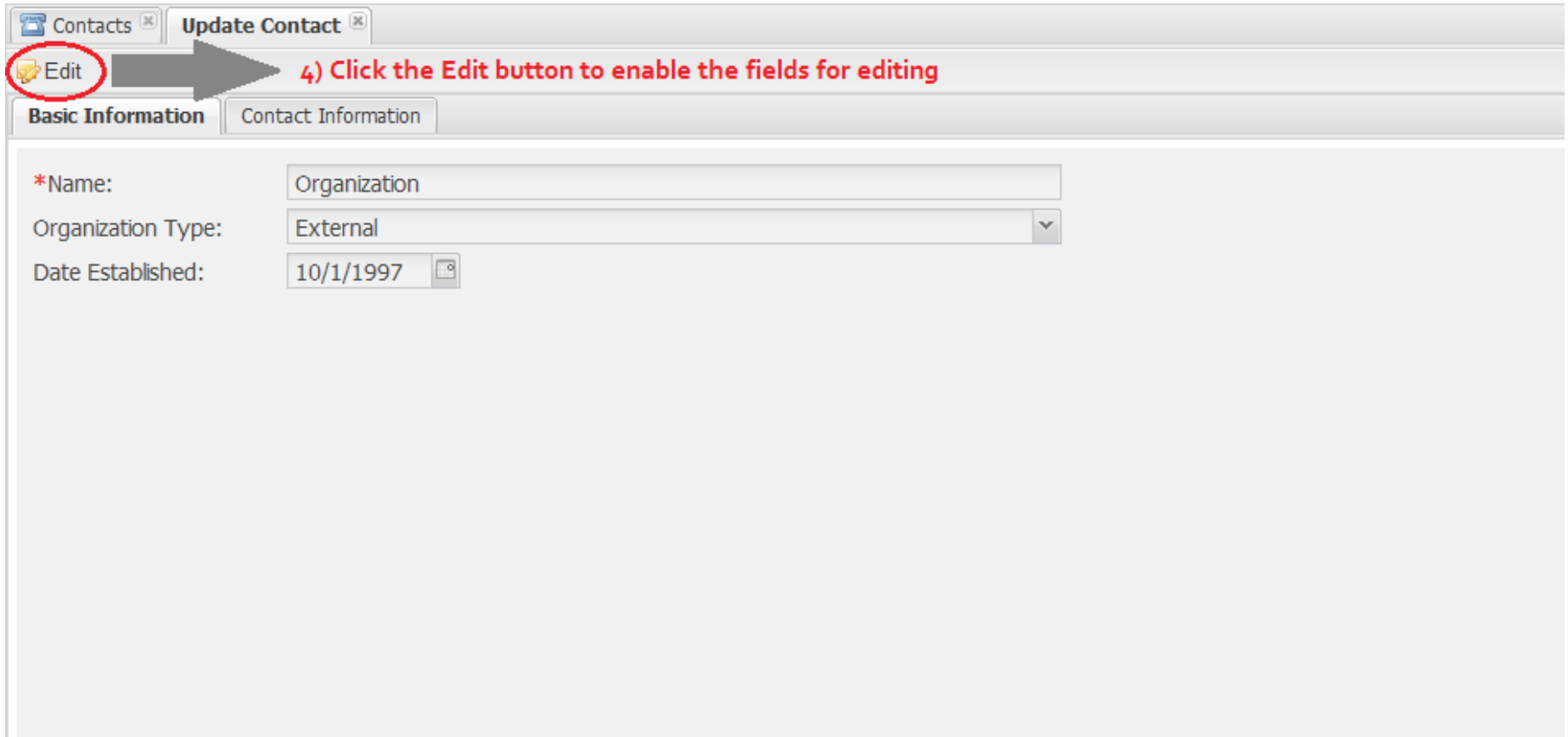
Navigation Area: A vertical list of menu items including 'Lending Application', 'Loan Products', 'Customers', 'Loan Applications', 'Loan Accounts', 'Loan Restructure', 'Additional Loan', 'Advance Change', 'Disbursements', 'Receipts', 'Cheques', 'Cheque Editor', 'Post Dated Cheques', 'Payment', 'Settings', 'Employees', 'Contacts', 'Banks', 'User Accounts', 'Holidays', 'Cash On Vault', 'Currency Conversion', 'Types', and 'Reports'. The 'Contacts' item is circled in red, with an arrow pointing to it labeled '1) Click the Contacts Node under the Settings Node'.

Contacts Window: A table with columns 'Contact ID', 'Name', 'Address', and 'Party Type'. It contains two rows: row 41 for 'Luna, Juan' (Person) and row 42 for 'Organization' (Organization). Row 42 is highlighted with a red oval, with an arrow pointing to it labeled '2) Select the record you want to update'. Above the table, there are buttons for 'Delete', 'Open' (circled in red), and 'Add'. An arrow points to the 'Open' button with the label '3) Click the Open button'.

Table Data:

Contact ID	Name	Address	Party Type
41	Luna, Juan	San Pedro, Pagadian, Philippines, 7016	Person
42	Organization	San Pedro, Pagadian, Philippines, 7016	Organization

EDIT CONTACT (ORGANIZATION)



Contacts **Update Contact**

Edit → 4) Click the Edit button to enable the fields for editing

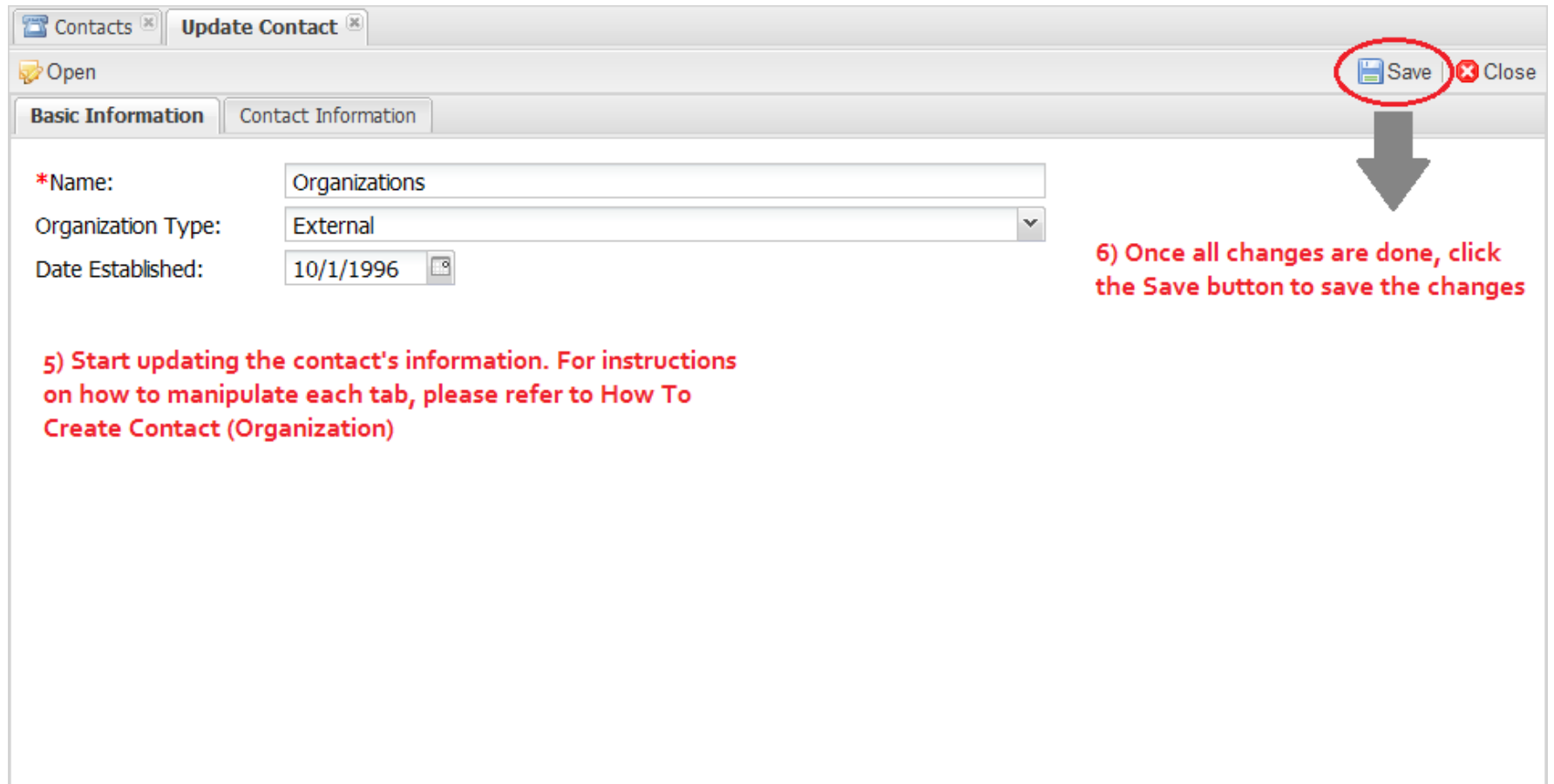
Basic Information **Contact Information**

*Name: Organization

Organization Type: External

Date Established: 10/1/1997

EDIT CONTACT (ORGANIZATION)



Contacts Update Contact

Open Save Close

Basic Information Contact Information

*Name: Organizations

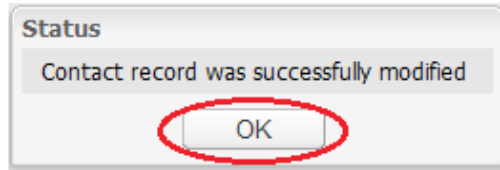
Organization Type: External

Date Established: 10/1/1996

5) Start updating the contact's information. For instructions on how to manipulate each tab, please refer to How To Create Contact (Organization)

6) Once all changes are done, click the Save button to save the changes

EDIT CONTACT (ORGANIZATION)



Done! Click OK to proceed to the updated contact list



Contacts			
Delete Open Add Search by...			
Contact ID	Name	Address	Party Type
41	Luna, Juan	San Pedro, Pagadian, Philippines, 7016	Person
42	Organizations	San Pedro, Pagadian, Philippines, 7016	Organization

The selected record will then be updated on the list

DELETE CONTACT

DELETE CONTACT

Navigation Area

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

Contacts

Search by... x v

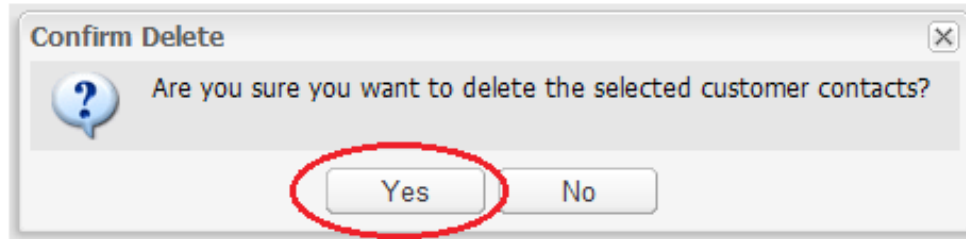
3) Click the Delete button

Contact ID	Name	Address	Party Type
41	Luna, Juan	San Pedro, Pagadian, Philippines, 7016	Person
42	Organization	San Pedro, Pagadian, Philippines, 7016	Organization

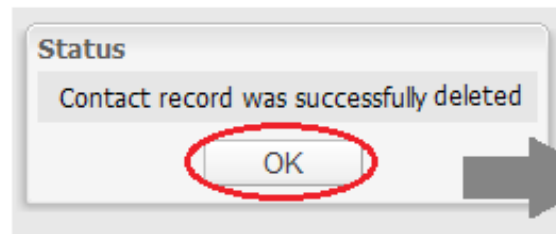
2) Select the record you want to delete

1) Click the Contacts Node under the Settings Node

DELETE CONTACT



4) A confirmation message will appear. Click Yes to continue deleting the contact.



Done! Click OK to go back to the Contacts list