

How to use Customer Classification Node (Types)

Create Customer Classification
Edit Customer Classification
Delete Customer Classification

CREATE CUSTOMER CLASSIFICATION

CREATE Customer Classification

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**
 - Customer Classification**
 - Required Document type
 - System Settings
- Reports

Customer Classification Types

Delete | Open | **Add**

District	Station Number
Danao District	2
Rizal District	1

1. Click the Customer Classification Node under the Types Node

2. Click the Add button

CREATE Customer Classification

The screenshot shows a web application interface for adding a customer classification. At the top, there is a navigation bar with three tabs: 'Home' (with a house icon), 'Customer Classification' (with a person icon), and 'Add Customer Classification' (with a plus icon). Below the navigation bar is a section titled 'Classification Details'. Inside this section, there are two buttons: 'Save' (with a floppy disk icon) and 'Cancel' (with a red 'X' icon). These buttons are circled in red. A black arrow points from the 'Save' button to the right. Below the buttons, there are two input fields. The first field is labeled '* District:' and contains the text 'North District'. The second field is labeled 'Station Number:' and contains the text '121'. To the right of the 'Save' and 'Cancel' buttons, there is a red instruction: '2. Click the Save button to create the new record or Cancel to cancel the action'. Below the input fields, there is another red instruction: '1. Fill in the required fields (*).'.

Home Customer Classification Add Customer Classification

Classification Details

Save Cancel

* District: North District

Station Number: 121

2. Click the Save button to create the new record or Cancel to cancel the action

1. Fill in the required fields (*).

CREATE Customer Classification

Status

Customer classification record was successfully created.

OK

An alert message will inform you that the creation of the record was successful. Click OK to return to the Customer Classification List.

CREATE Customer Classification

The screenshot shows a web application interface for 'Customer Classification'. At the top, there are tabs for 'Home' and 'Customer Classification'. Below the tabs, the title 'Customer Classification Types' is displayed. A toolbar contains 'Delete', 'Open', and 'Add' buttons, along with a search bar labeled 'Search classification by..'. A table with two columns, 'District' and 'Station Number', lists three entries: 'Danao District' with station number '2', 'North District' with station number '121', and 'Rizal District' with station number '1'. A red oval highlights the 'North District' row, and a black arrow points from it to a red text box that reads: 'You are then returned to the list with the newly added record.'

District	Station Number
Danao District	2
North District	121
Rizal District	1

EDIT CUSTOMER CLASSIFICATION

EDIT Customer Classification

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
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 - User Accounts
 - Holidays
 - Cash On Vault
 - Types
 - Customer Classification**
 - Required Document Type
 - System Settings
- Reports

Customer Classification Types

3. Click the Open button to view the selected record.

District	Station Number
Davao District	2
North District	121
Rizal District	1





2. Select the record you want to update.

1. Click the Customer Classification Node under the Types Node

EDIT Customer Classification

Home Customer Classification Update Customer Classification

Classification Details

 Edit  **Click the Edit button to update the record.**  Save  Cancel

* District: North District

Station Number: 121

EDIT Customer Classification

Home Customer Classification Update Customer Classification

Classification Details

Open

* District: North District

Station Number: 13

Save Cancel

1. Update the required fields (*)

2. Click the Save button to save the updated record or Cancel to cancel the action.

EDIT Customer Classification

Status

Customer classification record was successfully modified.

OK

**An alert message will inform you that the record was successfully updated.
Click OK to return.**

DELETE CUSTOMER CLASSIFICATION

DELETE Customer Classification

Navigation Area

- Lending Application
 - Loan Products
 - Customers
 - Loan Applications
 - Loan Accounts
 - Loan Restructure
 - Additional Loan
 - Loan Disbursement Voucher
- Disbursements
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- Receipts
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Customer Classification

Home Customer Classification

Customer Classification Types

Search classification by..

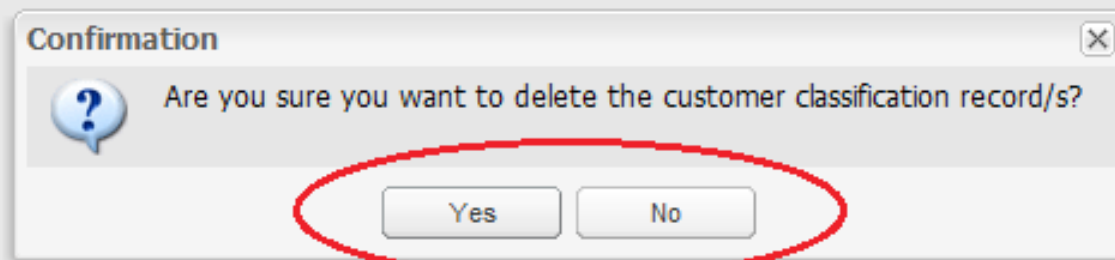
Delete Add **3. Click the Delete button.**

District	Station Number
Danan District	2
North District	13
Rizal District	1

2. Select the record you want to delete.

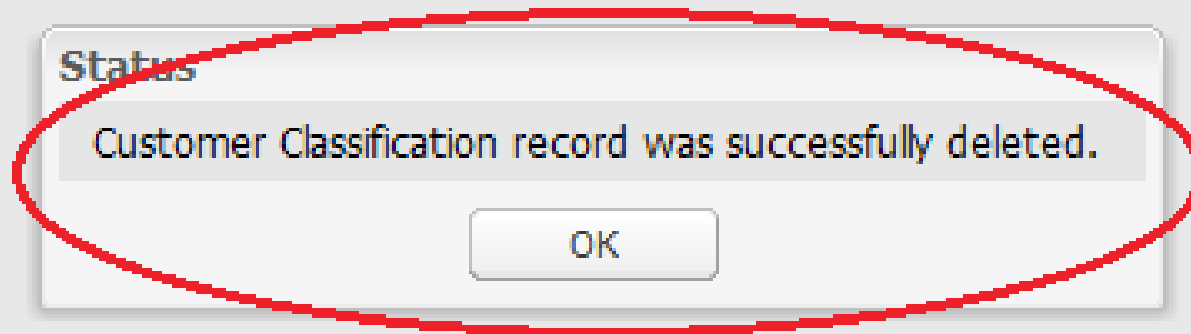
1. Click the Customer Classification Node under the Types Node

DELETE Customer Classification




A confirmation box will appear to confirm your action. Click Yes if you want to proceed to deletion and No otherwise.



DELETE Customer Classification






An alert message will inform you that the deletion of the record was successful. Click OK to return.

DELETE Customer Classification

 Home

 Customer Classification 

Customer Classification Types

 Delete |  Open |  Add

District	Station Number
Danao District	2
Rizal District	1

You are then returned to the list with the deleted record no longer available.