

HOW TO USE THE CHEQUE EDITOR NODE

CHEQUE EDITOR

Navigation Area

- Lending Application
 - Loan Products
 - Customers
 - Loan Applications
 - Loan Accounts
 - Loan Restructure
 - Additional Loan
 - Advance Change
 - Disbursements
 - Receipts
 - Cheques
 - Cheque Editor**
 - Payment
- Settings
- Contacts

Check Editor

*Received From: Browse

*Transaction Date: 10/29/2011

*Amount (Php):

Received By: Clerk, Clerk

*Cheque Payment Method: ▼

*Bank: Browse

*Check Number:

2. A new tab will open containing the form for cheque editing

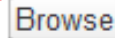


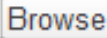
1. Click the Cheque Editor Node in the Navigation Area.

ADDING New Checks Using the Check Editor

ADD NEW CHECKS

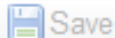
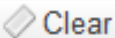
Loan Applications Cheque Editor

Check Editor To add new checks, fill up the first half of the form.

*Received From:	<input type="text"/>	
*Transaction Date:	<input type="text" value="10/29/2011"/>	
*Amount (Php):	<input type="text"/>	
Received By:	<input type="text" value="Clerk, Clerk"/>	
*Cheque Payment Method:	<input type="text"/>	
*Bank:	<input type="text"/>	
*Check Number:	<input type="text"/>	
Status:	<input type="text" value="Received"/>	
Remarks:	<input type="text"/>	

1. Click the Browse button to select from who the check is.

Please fill out the form.

 Save  Clear

ADD NEW CHECKS

The screenshot shows a software interface with three tabs: 'Loan Applications', 'Cheque Editor', and 'Customer List'. The 'Customer List' tab is active and circled in red. Below the tabs is a 'Select' button, also circled in red, with a black arrow pointing to it from the text '2. Click the Select button.' To the right of the 'Select' button is a red 'X' icon. Below the button is a table with three columns: 'CustomerID', 'Name', and 'Address'. The first row of the table is circled in red and contains the values '5', 'dela Cruz, Juan', and 'San Jose, Pagadian, Philippines, 701'. Below the table, the text '1. Select the customer with whom you want to add the checks for.' is displayed in red. At the bottom of the interface is a pagination bar showing 'Page 1 of 1' and navigation icons.

Loan Applications Cheque Editor **Customer List**

Select **2. Click the Select button.**

CustomerID	Name	Address
5	dela Cruz, Juan	San Jose, Pagadian, Philippines, 701

1. Select the customer with whom you want to add the checks for.

Page 1 of 1

ADD NEW CHECKS

Loan Applications

Cheque Editor

Check Editor

*Received From:

delacruz, Juan

Browse

*Transaction Date:

10/29/2011

*Amount (Php):

12,000.00

Received By:

Clerk, Clerk

*Cheque Payment Method:

Personal Check

*Bank:

MetroBank

Browse

*Check Number:

12345-67890-7856745

Status:

Received

Remarks:

*Check Date:

10/29/2011

Please fill out the form.

When done, click the Save button to add the new cheque.

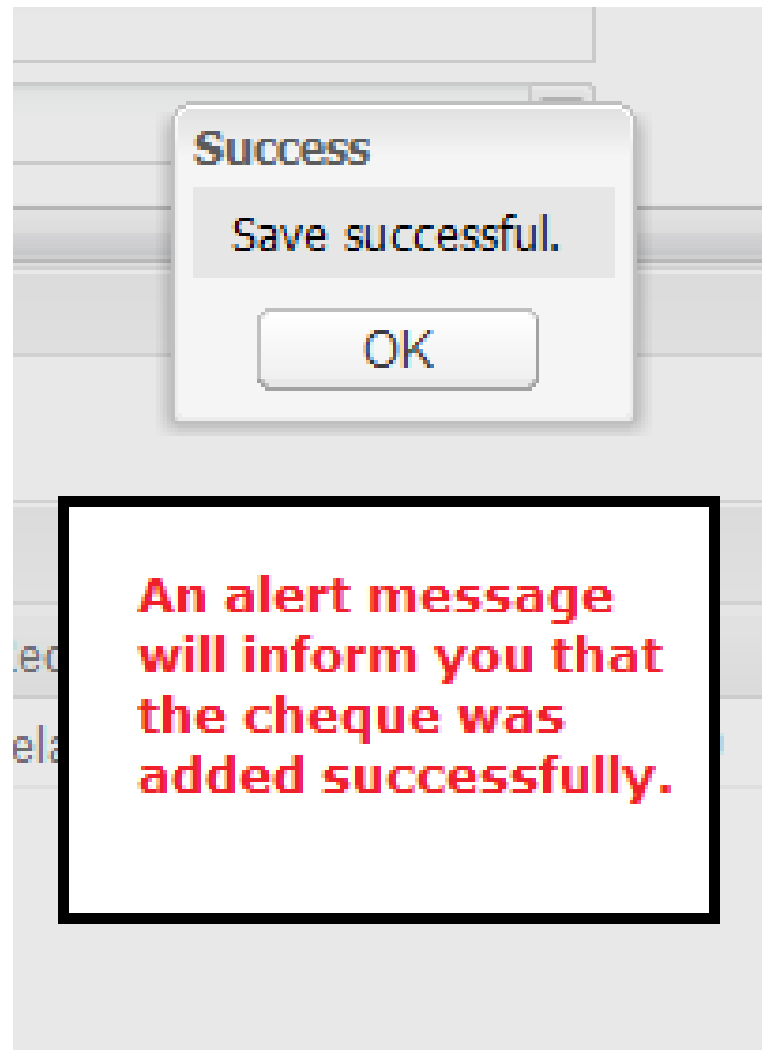
Save

Clear


Continue filling up all the required fields in the form.

Click the Clear button to empty the fields in the form.

ADD NEW CHECKS








ADD NEW CHECKS

 Edit

Cheque Number	Bank	Date Received	Received From	Amount	Status	Cheque Date
12345-67890-7856745	MetroBank	Oct 29, 2011	delacruz, Juan	12,000.00	Received	Oct 29, 2011

The newly added cheque is then added to the list in the bottom half of the form.

  | Page of 1 |   | 

Displaying cheques 1 - 1 of 1

EDITING Checks Using the Check Editor

EDIT CHECKS

 Edit						2. Click the Edit button to edit the record.	
Cheque Number	Bank	Date Received	Received From	Amount	Status		
12345-67890-7856745	MetroBank	Oct 29, 2011	dela Cruz, Juan	12,000.00	Received		

1. In the bottom half of the form, select in the list the check that you want to edit.

EDIT CHECKS

Loan Applications Cheque Editor

Check Editor

*Transaction Date: 10/29/2011

*Amount (Php): 12,000.00

Received By: Clerk, Clerk

*Cheque Payment Method: Personal Check

*Bank: MetroBank

*Check Number: 12345-67890-7856745

Status: Received

Remarks:

*Check Date: 10/29/2011

The upper half of the form is then filled with the details of the selected cheque record. You can then start updating the fields.

Browse




Form is valid.

Edit				
Cheque Number	Bank	Date Received	Received From	Amount
12345-67890-7856745	MetroBank	Oct 29, 2011	dela Cruz, Juan	12,000.00

EDIT CHECKS

Loan Applications ☐ Cheque Editor ☐

Check Editor

*Transaction Date:	10/29/2011	
*Amount (Php):	12,000.00	
Received By:	Clerk, Clerk	
*Cheque Payment Method:	Personal Check	
*Bank:	MetroBank	<input type="button" value="Browse"/>
*Check Number:	12345-67890-7856745	
Status:	Received	
Remarks:		
*Check Date:	10/29/2011	

Form is valid.

After updating the fields, click the Save button to save the changes.

EDIT CHECKS

