

How to Use User Accounts Node

- New
- Activate/Deactivate
- Change Password
- Update User Account Type

Create New User Account

MN Pamaran Lending Investors, Inc.

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

User Accounts

Home | User Accounts

Update User Account Type | Change Password | Activate | Deactivate | **New**

Search By.. type here.. Search Filter by User Type..

User Account ID	Name of the User	Username	User Account Type
No user accounts to display.			

1. Click the User Accounts Node in the Navigation Area

2. Click New Button

MN Pamaran Lending Investors, Inc.

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

Home

User Accounts

Create User Account

Save

Cancel

*Name:

Browse

*User Account Type:

*Username:

*Password:

*Confirm Password:

*Password Question:

*Password Answer:

3. Click 'Browse' button in the 'Create User Account tab' to select Employee

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5. Click Select button

4. Select Employee

Home User Accounts Create User Account Allowed Users Pick List

Select Cancel

Party Id	Name	Address
4	Miranda, Kae	Barangay, City, Philippines, 6700
5	Catubig, JP	Barangay, City, Province, Philippines, 6700

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7. Click Save button

Home User Accounts Create User Account

Save Cancel

*Name: Catubig, JP Browse

User Account Type: Loan Clerk

*Username: jpcatubig

*Password: ••••••

*Confirm Password: ••••••

*Password Question: What was the name of your first school?

*Password Answer: UP Lahug

6. Fill Required Fields / Necessary data

Note: Required Fields are those with * before the column name

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Home

User Accounts

Create User Account

Save

Cancel

*Name:

Catubig, JP

Browse

*User Account Type:

Loan Clerk

*Username:

jpcatubig

*Password:

••••••

*Confirm Password:

••••••

*Password Question:

What was the name of your first school?

*Password Answer:

UP Lahug

Status

Successfully added a new user account.

OK

This will appear if User Account was successfully saved.

Deactivate User Account

The screenshot shows a web application interface for managing user accounts. On the left is a 'Navigation Area' with a list of menu items. The main content area has a breadcrumb trail 'Home > User Accounts'. Below the breadcrumb are action buttons: 'Update User Account Type', 'Change Password', 'Activate', 'Deactivate', and 'New'. The 'Deactivate' button is circled in red. Below the buttons is a search bar and filter options. A table lists user accounts, with the first row circled in red. A large black arrow points from the circled row to the first instruction.

Navigation Area

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User Accounts

Update User Account Type | Change Password | Activate | **Deactivate** | New

Search By.. type here.. Search Filter by User Type.. Filter By Status..

User Account ID	Name of the User	Username	User Account Type	User Account Status
4	Catubig, JP	jpcatubig	Loan Clerk	Active

1. Select 'User Account' with User Account Status 'Active'

2. Click Deactivate button

Navigation Area

Lending Application

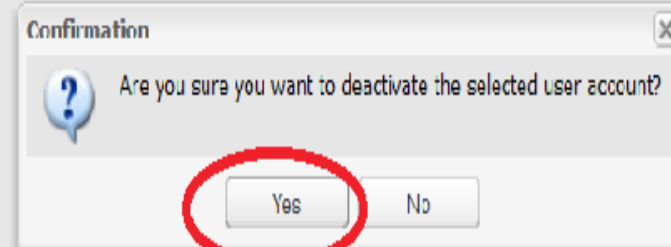
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- Customers
- Loan Applications
- Loan Accounts
- Loan Restructure
- Additional Loan
- Loan Disbursement Voucher
- Disbursements
- Billing
- Receipts
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- Holidays
- Cash On Vault
- Types
- Reports

Home User Accounts

Update User Account Type Change Password Activate Deactivate New

Search By type here Search Filter by User Type Filter By Status Apply

User/Account ID	Name of the User	Username	User/Account Type	User Account Status
4	Catubig, JP	jpcatubig	Loan Clerk	Active



3. Click Yes

Activate User Account

The screenshot displays a web application interface for managing user accounts. At the top, there are tabs for 'Home' and 'User Accounts'. Below the tabs, there are action buttons: 'Update User Account Type', 'Change Password', 'Activate' (highlighted with a red circle and a black arrow), 'Deactivate', and 'New'. A search bar and filter options are also present. A table lists user accounts, with the first row highlighted in grey and circled in red. This row represents a user with ID 4, named Catubig, JP, username jpcatubig, role Loan Clerk, and status Inactive. A black arrow points from this row to the first instruction. The 'Activate' button is also pointed to by a black arrow from the second instruction.

2. Click Activate Button

User Account ID	Name of the User	Username	User Account Type	User Account Status
4	Catubig, JP	jpcatubig	Loan Clerk	Inactive

1. Select User Account with User Account Status 'Inactive'

User Account ID	Name of the User	Username	User Account Type	User Account Status
4	Catubig, JP	jpcatubig	Loan Clerk	Inactive

Confirmation



Are you sure you want to activate the selected user account?

Yes

No



3. Click Yes

Change Password

MN Pamaran Lending Investors, Inc. Mr. Pama
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User Accounts

Home | User Accounts

Update User Account Type | **Change Password** | Activate | Deactivate | New

Search By.. type here.. Search Filter by User Type.. Filter By Status..

User Account ID	Name of the User	Username	User Account Type	User Account Status
4	Catubig, JP	jpcatubig	Loan Clerk	Active

2. Click 'Change Password' button

1. Select User Account

MN Pamaran Lending Investors, Inc.

Navigation Area

Home User Accounts Change Password User Account

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

5. Click Save

Save Close

Name: Catubig, JP

Username: jpcatubig

*New Password:

*Confirm New Password:

3. Enter new password

4. Confirm new password

Update User Account Type

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User Accounts

Home | **User Accounts** | **Update User Account Type** | Change Password | Activate | Deactivate | New

Search By.. type here.. Search Filter by User Type.. Filter By Sta

User Account ID	Name of the User	Username	User Account Type	User Account Status
4	Catubig, JP	jpcatubig	Loan Clerk	Active

1. Select User Account

2. Click 'Update User Account Type' button

Home

User Accounts

Update User Account Type

Edit

3. Click 'Edit' button

*Name: Catubig, JP

*Username: jpcatubig

*User Account Type: Loan Clerk

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Home **User Accounts** **Update User Account Type**

Save **5. Click Save button**

*Name: Catubig, JP

*Username: incatubig

*User Account Type: Loan Clerk

- Admin
- Loan Clerk**
- Teller
- Cashier

4. Select New User Account Type