

HOW TO FILL UP A NAME

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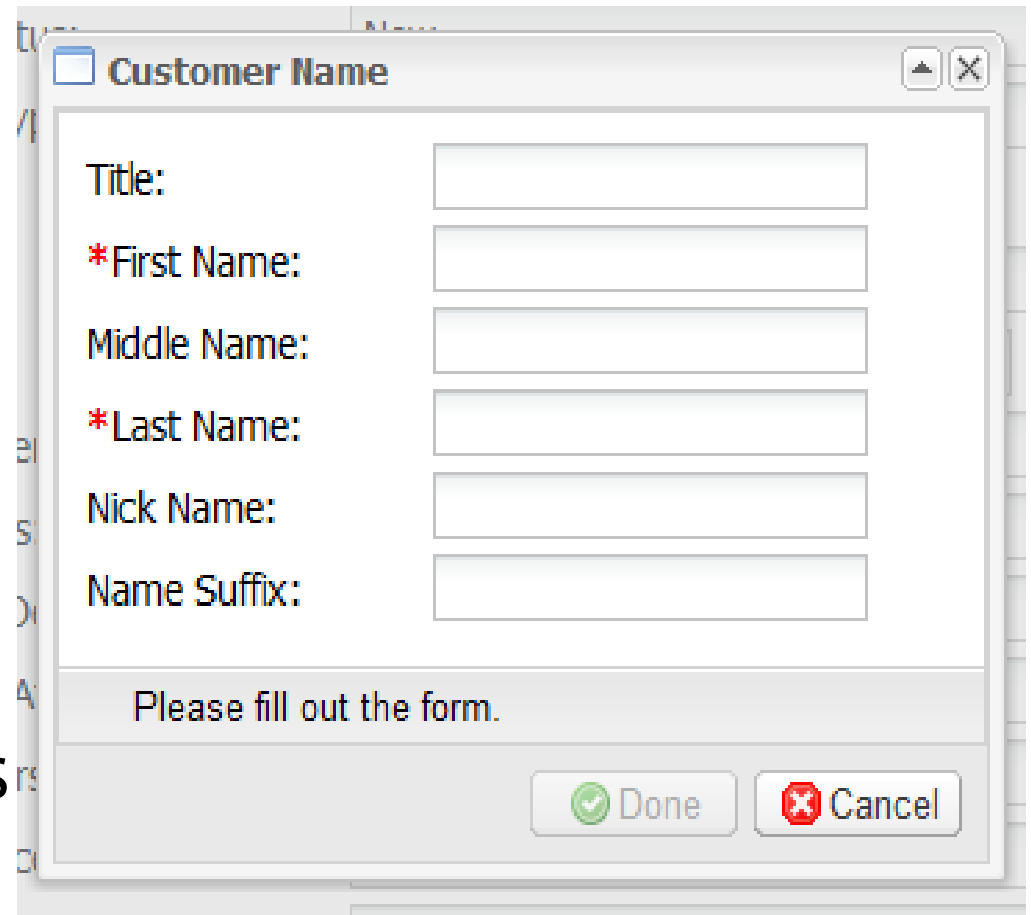
There are two ways to fill up a name in any part of the system:

- 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.



A screenshot of a 'Customer Name' details pop-up window. The window has a title bar with a close button (X) and a maximize button. Inside, there are six text input fields with labels: 'Title:', '*First Name:', 'Middle Name:', '*Last Name:', 'Nick Name:', and 'Name Suffix:'. The asterisks on 'First Name' and 'Last Name' indicate they are required fields. Below the input fields is a message that says 'Please fill out the form.' and two buttons: 'Done' (with a green checkmark icon) and 'Cancel' (with a red X icon).

HOW TO FILL UP A NAME

using the details pop-up window

*Name:

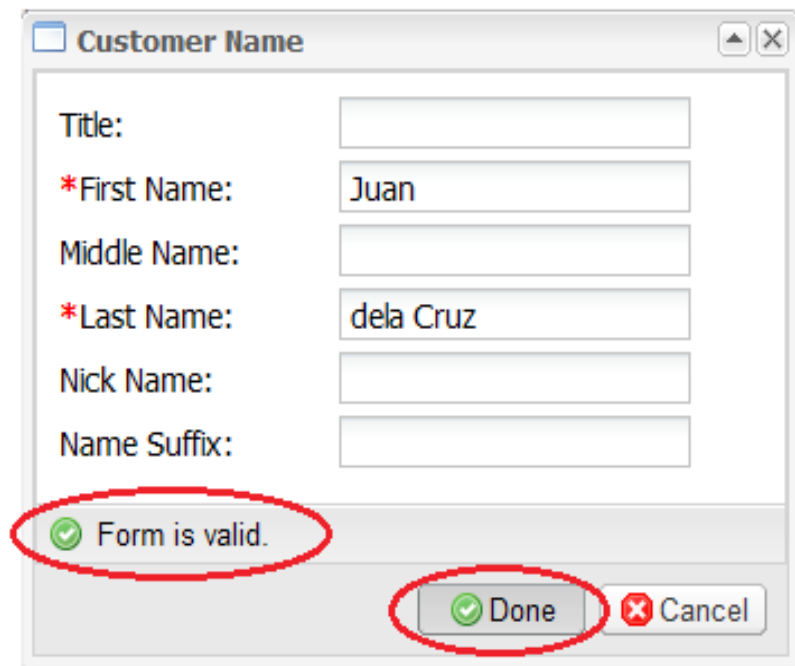
Browse..

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.

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



A screenshot of a 'Customer Name' pop-up window. It contains several input fields: 'Title:', '*First Name:' (filled with 'Juan'), 'Middle Name:', '*Last Name:' (filled with 'dela Cruz'), 'Nick Name:', and 'Name Suffix:'. At the bottom, there is a status bar with a green checkmark icon and the text 'Form is valid.' (circled in red), and two buttons: 'Done' (with a green checkmark icon, also circled in red) and 'Cancel' (with a red X icon).



*Name:

The field is then filled with the name you entered in the 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.

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

*Name:

Browse..

Click the Browse button to open a tab which contains the list of allowed names.



The screenshot shows a software interface with a tab titled "Allowed Customers Pick List" selected. The tab contains a table with the following data:

Name	Address	Role Type
Lee, Min Ho	Santiago, Pagadian, Philippines, 7016	Contact
Park, Min Young	Santiago, Pagadian, Philippines, 7016	Contact

A new tab will open containing the list of allowed names to use.

HOW TO FILL UP A NAME using the Names Pick List

Customers [X] Add Customer [X] Allowed Customers Pick List [X]

Select [X] Close

Name	Address	Role Type
Lee, Min Ho	Santiago, Pagadian, Philippines, 7016	Contact
Park, Min Young	Santiago, Pagadian, Philippines, 7016	Contact

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

*Name:

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.