

# **How to Create Loan Application (with term)**

# CREATE Loan Application

The screenshot displays a web application interface for loan management. On the left, a 'Navigation Area' sidebar lists various modules: Lending Application, Loan Products, Customers, **Loan Applications** (highlighted with a red circle), Loan Accounts, Loan Restructure, Additional Loan, Loan Disbursement Voucher, Disbursements, Billing, Receipts, Cheques, Cheque Editor, Payment, Settings, and Reports. A red arrow points from the 'Loan Applications' node to the main content area. The main area has a title bar with 'Home' and 'Loan Applications' tabs. Below the title bar is a toolbar with buttons: Delete, Open, **New** (highlighted with a red circle), Approve, Cancel, Reject, and Print Application Form. A search bar is located below the toolbar. Below the search bar is a table with columns: Loan Application Id, Customer's Name, Loan Product, and Collateral. The table is currently empty, and a message at the bottom right states 'No loan applications to display'.

**Click the LoanApplications Node in the Navigation Area**

**Click the New button to create a new loan application**

*No loan applications to display*

# CREATE Loan Application


# CREATE Loan Application (Borrower's Information)

Home Loan Applications **Create Loan Application Record**

Save Close

**Borrowers Information** Loan Application Details Outstanding Loans Fees and Co-Borrowers Guarantors, Collaterals and Submitted Documents

**Basic Information**

 \*Name:  **Click the Browse button to open a list of allowed customers where you can pick the customer you want to add.**

District:

Station Number:

Customer Status:

Gender:

Age:

Credit Limit:

**Contact Information**

Primary Home Address:

Cellphone Number:  -  -

Primary Telephone Number:  -  -

Primary Email Address:

# CREATE Loan Application (Borrower's Information)

Home Loan Applications Create Loan Application Record **Select Customer** Clicking the Name's Browse button will open this tab.

Select Close 2. Click the Select button to use the selected customer or Close return. Search By Status... Name: Search

CustomerID	Name	Address	Party Ty
4	1. Select the Customer dela Cruz, Juan	San Roque, Mandaue, Philippines, 6014	Person
6	Magale, Allan	Hipodromo, Cebu, Philippines, 6000	Person
7	Lee, Min Ho	San Juan, Lapu-Lapu, Philippines, 6013	Person


# CREATE Loan Application (Borrower's Information)

[Home](#) | [Loan Applications](#) | [Create Loan Application Record](#)

[Save](#) | [Close](#)

**Borrowers Information** | [Loan Application Details](#) | [Outstanding Loans](#) | [Fees and Co-Borrowers](#) | [Guarantors, Collaterals and Submitted Documents](#) | [Schedule and Cheques](#)

**Basic Information**



**\*Name:**  [Browse...](#)

**District:**

**Station Number:**

**Customer Status:**

**Gender:**

**Age:**

**Credit Limit:**

**After selecting the customer, the form will be automatically filled with the customer's information.**

**Note: All borrower's information in this tab is not editable. If you want to update a customer's record, go to the Customer's node.**

**Contact Information**

**Primary Home Address:**

**Cellphone Number:**  -  -

**Primary Telephone Number:**  -  -

**Primary Email Address:**

Please completely fill out the forms.

# CREATE Loan Application (Loan Application Details)

Home | Loan Applications | Create Loan Application Record

Save | Close

After filling the Borrower's Information, proceed to next tab.

Borrowers Information | **Loan Application Details** | Outstanding Loans | Fees and Co-Borrowers | Guarantors, Collaterals and Subm

Application Date: 10/7/2011

Loan Application Status: Pending: Approval

Status Comment:

\*Loan Product Name: Click the Browse button to open a list of allowed loan products that the borrower can use for the loan application. **Browse...**

\*Loan Release Date:

\*Loan Amount:

\*Is the loan with term?: ☐ Yes ☒ No

Loan Term: 0

Loan Purpose:

\*Collateral Requirement:

\*Interest Computation Mode:

# CREATE Loan Application (Loan Application Details)

Home | Loan Applications | Create Loan Application Record | **Select Financial Product**

**Select** | **Cancel** | 2. Click the Select button to use the selected loan product. | This tab will open after clicking the loan product name's Browse button. | Name: Search

ID	Name	Introduction Date	Sales Discontinuation Date	Status
1	Salary Loan	10/06/2011		Active

1. Select the loan product.



Home | Loan Applications | Create Loan Application Record

Save | Close

Borrowers Information | **Loan Application Details** | Outstanding Loans | Fees and Co-Borrowers | Guarantors, Collaterals and Submitted Documents | Schedule and Cheques

Application Date: 10/7/2011

Loan Application Status: Pending: Approval

Status Comment:

\*Loan Product Name: **Salary Loan** | Browse...

\*Loan Release Date:

\*Loan Amount:

\*Is the loan with term?: ☐ Yes ☒ No

Loan Term (Month/s): 0

After clicking the Select button, you are then returned to the Loan Application Details tab where the selected loan product is already available.



# CREATE Loan Application (Loan Application Details)

Home | Loan Applications | Create Loan Application Record

Save | Close

Borrowers Information | **Loan Application Details** | Outstanding Loans | Fees and Co-Borrowers | Guarantors, Collaterals and Submitted Documents | Schedule and Cheques

Application Date: 10/7/2011

Loan Application Status: Pending: Approval

Status Comment:

\*Loan Product Name: Salary Loan Browse...

\*Loan Release Date: 11/1/2011

\*Loan Amount: 20,000.00

\*Is the loan with term?: ☒ Yes ☐ No Select Yes to make the application a loan with term.

\*Loan Term (Month/s): 10 Fill in the term (in this case, months)

Loan Purpose:

\*Collateral Requirement: Secured

\*Interest Computation Mode: Diminishing Balance Method

\*Payment Mode: Monthly

\*Method of Charging Interest: Add-on Interest

**Interest Rate**

\*Description: Browse...

\*Interest Rate: %

No generated amortization schedule. Once the loan application has a term, the status message will remind you that you should generate a schedule based on the term.

# CREATE Loan Application

## (Loan Application Details)

* Collateral Requirement:	Secured
* Interest Computation Mode:	Secured
Payment Mode:	Unsecured

Click the field to see a drop down list of choices for Collateral Requirement.

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* Collateral Requirement:	Secured
* Interest Computation Mode:	Diminishing Balance Method
Payment Mode:	Diminishing Balance Method
* Method of Charging Interest:	Straight Line Method

Click the field to see a drop down list of choices for Interest Computation Mode.

# CREATE Loan Application

## (Loan Application Details – Interest Rate)

### Manual

Interest Rate	
*Description:	<input type="text"/> <input type="button" value="Browse..."/>
*Interest Rate:	<div>Monthly Interest Rate Annual Interest Rate</div> <div>Click the field to see a drop down list of choices for the Interest Rate Description.</div>

Interest Rate	
*Description:	Monthly Interest Rate <input type="button" value="Browse..."/>
*Interest Rate:	10  <b>Fill in the Interest Rate</b> %

# CREATE Loan Application

## (Loan Application Details – Interest Rate)

### From a List

**Interest Rate**

\*Description:  **Click the Browse button to select an interest rate from a list of rates available for the selected loan product.**

\*Interest Rate:  %

Home Loan Applications Create Loan Application Record **Select Interest Rate**

**Select**  **2. Click the Select button.** **A new tab will open for you to select an interest rate.**

Description	Interest Rate
Monthly Interest Rate	1 <b>1. Select the interest rate.</b>
Monthly Interest Rate	2.5
Monthly Interest Rate	3

**Interest Rate**

\*Description:

\*Interest Rate:  %

**The selected interest rate will then automatically fill the fields.**

# CREATE Loan Application (Outstanding Loans)

[Home](#) [Loan Applications](#) [Create Loan Application Record](#)

[Save](#) [Close](#)

[Borrowers Information](#) [Loan Application Details](#) [Outstanding Loans](#) [Fees and Co-Borrowers](#) [Guarantors, Collaterals and Submitted Documents](#) [Schedule and Cheques](#)

Pay the following outstanding loan/s using the proceeds of the new loan: ☐ Check this box if you want to use this loan to fully pay the remaining balance of your previous loans.

<input type="checkbox"/>	Loan ID	Loan Product Name	Interest Computation Mode	Maturity Date	No. Of Installments	Payment Mode	Scheduled Amortization	Loan Balance
<input type="checkbox"/>	1	Salary Loan	Diminishing Balance Method		0	Monthly	0.00	25,000.00
<input type="checkbox"/>	2	Salary Loan	Diminishing Balance Method		0	Monthly	0.00	25,000.00

**Note: If the borrower doesn't want to pay his outstanding loan or if he doesn't have any outstanding loan, you may skip this tab.**

# CREATE Loan Application (Outstanding Loans)

Home | Loan Applications | **Create Loan Application Record**

Save | Close

Borrowers Information | Loan Application Details | **Outstanding Loans** | Fees and Co-Borrowers | Guarantors, Collaterals and Submitted Documents | Schedule and Cheques

Pay the following outstanding loan/s using the proceeds of the new loan: ☒ **If you check this box, you have to select an outstanding loan below.**

**Outstanding Loan/s to Pay Off**

<input type="checkbox"/>	Loan ID	Loan Product Name	Interest Computation Mode	Maturity Date	No. Of Installments	Payment Mode	Scheduled Amortization	Loan Balance
<input type="checkbox"/>	1	Salary Loan	Diminishing Balance Method		0	Monthly	0.00	25,000.00
<input type="checkbox"/>	2	Salary Loan	Diminishing Balance Method		0	Monthly	0.00	25,000.00

**No selected outstanding loan.** **This status message will inform you that you have not yet selected an outstanding loan to pay off.**

# CREATE Loan Application (Outstanding Loans)

Home | Loan Applications | **Create Loan Application Record**

Save | Close

Borrowers Information | Loan Application Details | **Outstanding Loans** | Fees and Co-Borrowers | Guarantors, Collaterals and Submitted Documents | Schedule and Cheques

Pay the following outstanding loan/s using the proceeds of the new loan: ☒

**Outstanding Loan/s to Pay Off**

<input type="checkbox"/>	Loan ID	Loan Product Name	Interest Computation Mode	Maturity Date	No. Of Installments	Payment Mode	Scheduled Amortization	Loan Balance
<input checked="" type="checkbox"/>	1	Salary Loan	Diminishing Balance Method		0	Monthly	0.00	25,000.00
<input type="checkbox"/>	2	Salary Loan	Diminishing Balance Method		0	Monthly	0.00	25,000.00

**Form is valid.** Once you select, the status message will inform you that the form is valid and can be saved.

# CREATE Loan Application (Fees)

[Home](#) | [Loan Applications](#) | [Create Loan Application Record](#)

Save | Close

**This tab is optional.**

[Borrowers Information](#) | [Loan Application Details](#) | [Outstanding Loans](#) | **[Fees and Co-Borrowers](#)** | [Guarantors, Collaterals and Submitted Documents](#) | [Schedule and Cheques](#)

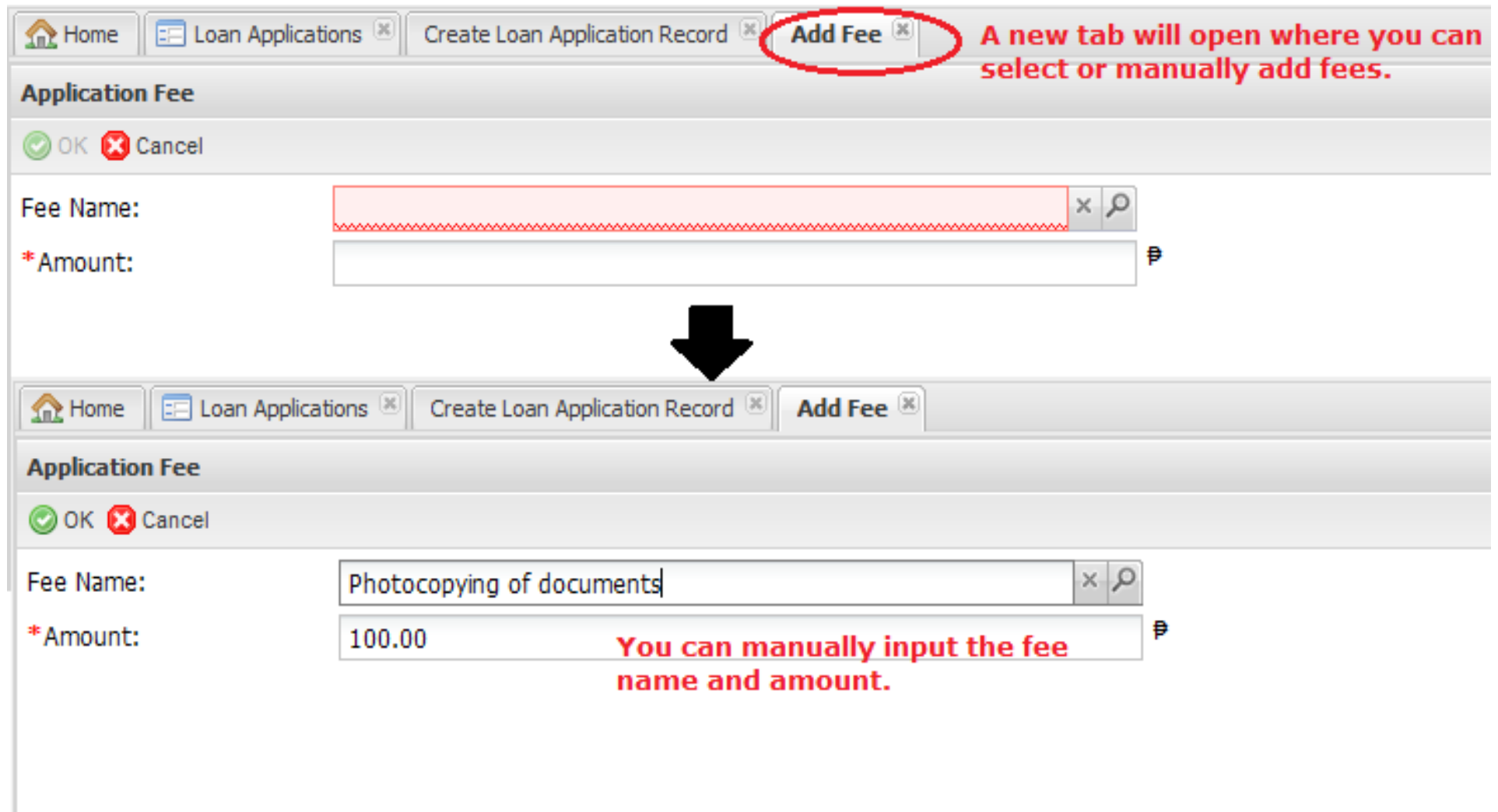
**Fees**

[Delete](#) | **[Add](#)** | [Re-Calculate](#) **Click the Add button to add fees associated to this loan application.**

Name	Fee Amount	Charge Amount	Base Amount	Rate	Total Charge Per Fee
No fees to display					



# CREATE Loan Application (Fees - Manual)



Home Loan Applications Create Loan Application Record **Add Fee** A new tab will open where you can select or manually add fees.

**Application Fee**

OK Cancel

Fee Name:

\* Amount:

Home Loan Applications Create Loan Application Record **Add Fee**

**Application Fee**

OK Cancel

Fee Name:

\* Amount:

You can manually input the fee name and amount.

# CREATE Loan Application (Fees - Browse)

**Application Fee**

OK Cancel

Fee Name:

\*Amount:

You can also select from a list of available fees associated to the loan product used in the loan application.

Home Loan Applications Create Loan Application Record Add Fee Select Fee A new tab will open.

Select Cancel 2. Click the Select button to select the fee.

Name	Charge Amount	Base Amount
Documentary Stamp Tax	10.00	5,000.00

1. Select a fee you want to add.

Home Loan Applications Create Loan Application Record Add Fee

**Application Fee**

OK Cancel Click the OK button to Add the fee.

Fee Name:

\*Amount:

The selected fee will automatically fill the fields.

# CREATE Loan Application (Fees)

Home

Loan Applications

Create Loan Application Record

Save

Close

Borrowers Information

Loan Application Details

Outstanding Loans

Fees and Co-Borrowers

Guarantors, Collaterals and Submitted Documents

Schedule and Cheques

Fees

Delete

Add

Re-Calculate

Name	Fee Amount	Charge Amount	Base Amount	Rate	Total Charge Per Fee
Documentary Stamp Tax	0.00	10.00	5,000.00	0	70.00
Photocopying of documents	100.00	0.00	0.00	0	100.00

The fees are then added to the list of fees associated in the loan application.

# CREATE Loan Application (Co-Borrowers)

[Home](#) | [Loan Applications](#) | [Create Loan Application Record](#)

[Save](#) | [Close](#)

[Borrowers Information](#) | [Loan Application Details](#) | [Outstanding Loans](#) | **[Fees and Co-Borrowers](#)** | [Guarantors, Collaterals and Subm](#)

**Fees**

[Delete](#) | [Add](#) | [Re-Calculate](#)

Name	Fee Amount	Charge Amount	Base Amount
Documentary Stamp Tax	0.00	10.00	5,000.00
Photocopying of documents	100.00	0.00	0.00

**Co-borrowers**

[Delete](#) | [Add](#)

**Click the Add button to add Co-borrowers for the loan application.**

Party ID	Name	Primary Home Address
<i>No co-borrowers to display</i>		

# CREATE Loan Application (Co-Borrowers)

Home Loan Applications Create Loan Application Record Select Co-Borrower

Select Cancel

Party Id	Name	Address
7	Lee, Min Ho	San Juan, Lapu-Lapu, Philippines, 6013
6	Magale, Allan	Hipodromo, Cebu, Philippines, 6000

**Select the name of the co-borrower you want to add.**

**Note: If the co-borrower's name is not included in this list, create a customer record through the Customer Node and then return here to add them.**

# CREATE Loan Application (Co-Borrowers)

Home Loan Applications Create Loan Application Record

Save Close

Borrowers Information Loan Application Details Outstanding Loans Fees and Co-Borrowers Guarantors, Collaterals and Submitted Documents

**Fees**

Delete Add Re-Calculate

Name	Fee Amount	Charge Amount	Base Amount
Documentary Stamp Tax	0.00	10.00	5,000.00
Photocopying of documents	100.00	0.00	0.00

**Co-borrowers**

Delete Add

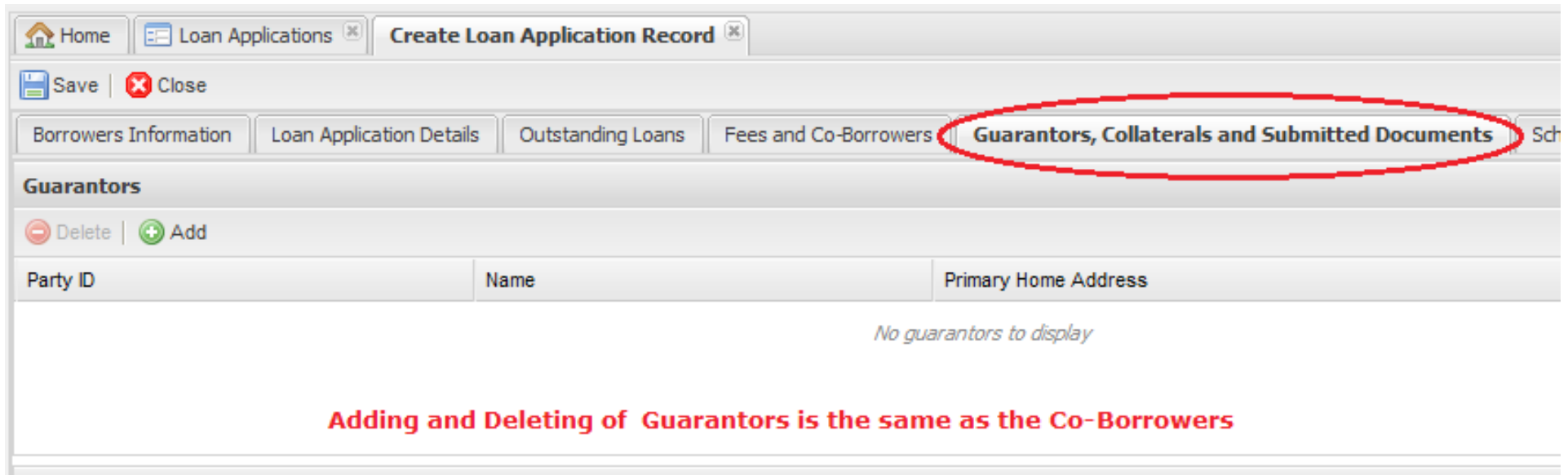
Party ID	Name	Primary Home Address
7	Lee, Min Ho	San Juan, Lapu-Lapu, Philippines, 6013

After selecting, the borrower is then added to the Co-borrower's list.

Note: You can add as many co-borrowers as you want.

Form is valid.

# CREATE Loan Application (Guarantors)



The screenshot shows a web application interface for creating a loan application record. The top navigation bar includes 'Home', 'Loan Applications', and 'Create Loan Application Record'. Below this is a toolbar with 'Save' and 'Close' buttons. A series of tabs are visible: 'Borrowers Information', 'Loan Application Details', 'Outstanding Loans', 'Fees and Co-Borrowers', 'Guarantors, Collaterals and Submitted Documents' (highlighted with a red oval), and 'Sch'. The 'Guarantors' section is active, showing a table with columns 'Party ID', 'Name', and 'Primary Home Address'. The table is currently empty, with the text 'No guarantors to display' centered below it. At the bottom, a red text message states: 'Adding and Deleting of Guarantors is the same as the Co-Borrowers'.

Home | Loan Applications | Create Loan Application Record

Save | Close

Borrowers Information | Loan Application Details | Outstanding Loans | Fees and Co-Borrowers | **Guarantors, Collaterals and Submitted Documents** | Sch

**Guarantors**

[-] Delete | [+] Add

Party ID	Name	Primary Home Address
No guarantors to display		

**Adding and Deleting of Guarantors is the same as the Co-Borrowers**

# CREATE Loan Application (Collateral – Bank Account)

Home Loan Applications Create Loan Application Record **Manage Bank Account** A new tab will open that will ask for details regarding the collateral.

**Collateral - Bank Account**

OK Cancel

Collateral Type: Bank Account

\*Bank Account Type:

\*Bank:  **Click the Browse button to select a Bank.** **Browse...** **Note: If a bank is not in the list when you click the Browse button, go to the Bank node and add a Bank.**

\*Bank Account Number:

\*Bank Account Name:

Collateral Description:

**Property Owner/s**

Delete Edit **Add** **Click the Add button to add the property owner of the collateral.**

Party ID	Name	Address	Percent Owned
No property owners to display			

**Please add property owner.** **The status message will inform you of the missing and invalid input.**



# CREATE Loan Application (Collateral – Bank Account)

[Home](#) [Loan Applications](#) [Create Loan Application Record](#) [Manage Bank Account](#)

**Collateral - Bank Account**

☒ OK ☐ Cancel **Click OK to add this Bank Account Collateral.**

Collateral Type:

Bank Account

\*Bank Account Type:

Savings

\*Bank:

MetroBank

Browse...

\*Bank Account Number:

1234-56789-8965

\*Bank Account Name:

Juan dela Cruz

Collateral Description:

Personal Account

**Property Owner/s**

Party ID	Name	Address	Percent Owned
4	dela Cruz, Juan	San Roque, Mandaue, Philippines, 6014	100

☒ Form is valid. **After all fields are filled and checked, the form is ready to be submitted.**

# CREATE Loan Application (Collateral – Bank Account)

Home Loan Applications Create Loan Application Record

Save Close

Borrowers Information Loan Application Details Outstanding Loans Fees and Co-Borrowers **Guarantors, Collaterals and Submitted Documents** S

**Guarantors**

Delete Add

Party ID	Name	Primary Home Address
<i>No guarantors to display</i>		

**Collaterals**

Delete Edit Add

**The collateral is then added to the Collaterals List**

Collateral Type	Description
Bank Account	Personal Account

# CREATE Loan Application (Collateral – Land)

Home Loan Applications Create Loan Application Record Manage Land

Collateral - Land

OK Cancel

Collateral Type:

Land

\*Land Type:

Urban

\*Land Area:

12

\*Unit Of Measure:

Hectares

\*OCT/TCT Number:

123456

\*Property Location:

San Roque, Mandaue, Philippines, 6000

Browse...

Collateral Description:

Fill up all the fields and then Click OK to add the land to the Collaterals list.




Property Owner/s

Delete Edit Add

Party ID	Name	Address	Percent Owned
4	delacruz, Juan	San Roque, Mandaue, Philippines, 6014	75

Form is valid.

# CREATE Loan Application (Collateral – Land)

Collaterals		Note: To Edit/Delet, select a record from the list and click the Edit/Delete button.
 Delete    Edit    Add ▾		
Collateral Type	Description	
Bank Account	Personal Account	
Land	Major Owner	<b>It is then added to the Collaterals List.</b>

# CREATE Loan Application (Submitted Documents)

[Home](#) | [Loan Applications](#) | [Create Loan Application Record](#) | [Add Documents](#)

**Submitted Document**

|

Document Name:

3 Months Payslip

Date Submitted:

10/7/2011

Description:

Payslip Scanned Photocopies

Fill in the fields.

**Document Page**

|

Click the New button to upload the document or Delete Last to delete the last uploaded document.


Page Number	File Name
No uploaded documents to display	

Please add document.

# CREATE Loan Application (Submitted Documents)


Upload New Document

Name:

Photo:  

Upload New Document

Name:

Photo:  

Click the Save button to add the file.

# CREATE Loan Application (Submitted Documents)

Home Loan Applications Create Loan Application Record Add Documents

**Submitted Document**

☒ Submit ☐ Cancel

2. Click the Submit button to proceed.

Document Name: 3 Months Payslip

Date Submitted: 10/7/2011

Description: Payslip Scanned Photocopies

**Document Page**

+ New - Delete Last

Page Number	File Name
1	Page 1

1. The uploaded file record is then added in the Document page of the loan application

# CREATE Loan Application (Submitted Documents)

Home | Loan Applications | **Create Loan Application Record**

Save | Close

Borrowers Information | Loan Application Details | Outstanding Loans | Fees and Co-Borrowers | **Guarantors, Collaterals and Submitted Documents** | Search

### Guarantors

Delete | Add

Party ID	Name	Primary Home Address
No guarantors to display		

### Collaterals

Delete | Edit | Add

Collateral Type	Description
Bank Account	Personal Account
Land	Major Owner

### Submitted Documents

Delete | Open | Add

**The document record is then added in the Submitted documents list of the loan application.**

Document Name	Date Submitted	Status	Description
3 Months Payslip	10/07/2011	Approved	Payslip Scanned Photocopies



# CREATE Loan Application (Schedule – Without Checks)



Home | Loan Applications | **Create Loan Application Record**

Save | Close

Borrowers Information | Loan Application Details | Outstanding Loans | Fees and Co-Borrowers | Guarantors, Collaterals and Submitted Documents | **Schedule and Cheques** *The last tab*

**Amortization Schedule**

Add Post Dated Checks: ☐ **The payment start date at default is set at the end of the month after the loan release date.**

\*Payment Start Date: 11/30/2011  **Generate Schedule**  Print Temporary Schedule

Unit	Payment Due Date	Principal Due	Interest Due	Total	Principal Balance	Total L Balance
<i>No amortization schedule to display</i>						

**Associated Checks**

Check Number	Amount	Check Date	Bank Name	Status
<i>No cheques to display</i>				

No generated amortization schedule.

**Click the Generate Schedule button to generate a schedule based on the term specified in the Loan Application Details tab**

# CREATE Loan Application (Schedule – Without Checks)

[Home](#) | [Loan Applications](#) | [Create Loan Application Record](#)

[Save](#) | [Close](#)

[Borrowers Information](#) | [Loan Application Details](#) | [Outstanding Loans](#) | [Fees and Co-Borrowers](#) | [Guarantors, Collaterals and Submitted Documents](#) | [Schedule and Cheques](#)

**Amortization Schedule**

Add Post Dated Checks: ☐

\*Payment Start Date:  | [Generate Schedule](#) | [Print Temporary Schedule](#)

Unit	Payment Due Date	Principal Due	Interest Due	Total	Principal Balance	Total Loan Balance
Month 1	11/30/2011	2,000.00	200.00	2,200.00	18,000.00	19,800.00
Month 2	01/02/2012	2,000.00	200.00	2,200.00	16,000.00	17,600.00
Month 3	02/29/2012	2,000.00	200.00	2,200.00	14,000.00	15,400.00
Month 4	04/02/2012	2,000.00	200.00	2,200.00	12,000.00	13,200.00
Month 5	05/31/2012	2,000.00	200.00	2,200.00	10,000.00	11,000.00
Month 6	07/31/2012	2,000.00	200.00	2,200.00	8,000.00	8,800.00
Month 7	08/31/2012	2,000.00	200.00	2,200.00	6,000.00	6,600.00
Month 8	10/31/2012	2,000.00	200.00	2,200.00	4,000.00	4,400.00

**Associated Checks**

Check Number	Amount	Check Date	Bank Name	Status
No cheques to display				

**Form is valid.** After you generate schedule, the status message will inform you that the loan is ready to be saved.

# CREATE Loan Application (Schedule – With Checks)

Home Loan Applications Create Loan Application Record

Save Close

Borrowers Information Loan Application Details Outstanding Loans Fees and Co-Borrowers Guarantors, Collaterals and Submitted Documents **Schedule and Cheques**

**Amortization Schedule**

Add Post Dated Check: ☒

Check the box if the borrower gives a post-dated check as collateral.

\*Payment Start Date: 11/30/2011

Unit	Payment Due Date	Principal Due	Interest Due	Total	Principal Balance	Total Loan Balance
No amortization schedule to display						

Click the Generate Schedule to generate schedule and checks

**Associated Checks**

Check Number	Amount	Check Date	Bank Name	Status
No cheques to display				

Note: The number of checks is automatically equal to the loan's term.

No generated amortization schedule.

# CREATE Loan Application (Schedule – With Checks)

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[Guarantors, Collaterals and Submitted Documents](#)
[Schedule and Cheques](#)

### Amortization Schedule

Add Post Dated Checks: ☒
 \*Payment Start Date: 
[Generate Schedule](#)
[Print Temporary Schedule](#)

Unit	Payment Due Date	Principal Due	Interest Due	Total	Principal Balance	Total Loan Balance
Month 1	11/30/2011	2,000.00	200.00	2,200.00	18,000.00	19,800.00
Month 2	01/02/2012	2,000.00	200.00	2,200.00	16,000.00	17,600.00
Month 3	02/29/2012	2,000.00	200.00	2,200.00	14,000.00	15,400.00
Month 4	04/02/2012	2,000.00	200.00	2,200.00	12,000.00	13,200.00
Month 5	05/31/2012	2,000.00	200.00	2,200.00	10,000.00	11,000.00
Month 6	07/31/2012	2,000.00	200.00	2,200.00	8,000.00	8,800.00
Month 7	08/31/2012	2,000.00	200.00	2,200.00	6,000.00	6,600.00
Month 8	10/31/2012	2,000.00	200.00	2,200.00	4,000.00	4,400.00

### Associated Checks

Check Number	Amount	Check Date	Bank Name	Status
	2,200.00	Nov 30 2011		
	2,200.00	Jan 02 2012		
	2,200.00	Feb 29 2012		
	2,200.00	Apr 02 2012		
	2,200.00	May 31 2012		
	2,200.00	Jul 31 2012		
	2,200.00	Aug 31 2012		
	2,200.00	Oct 31 2012		
	2,200.00	Dec 31 2012		
	2,200.00	Jan 31 2013		

The schedule and checks are then automatically created.  
 Note: To edit the checks' information, double click each row.

Form is valid.

# CREATE Loan Application (Schedule – With Checks)

Payment Due Date	Principal Due	Interest Due	Total	Principal Balance	Total Loan Balance
0/2011	2,000.00	200.00	2,200.00	18,000.00	19,800.00
2/2012	2,000.00	200.00	2,200.00	16,000.00	17,600.00
9/2012	2,000.00	200.00	2,200.00	14,000.00	15,400.00
2/2012	2,000.00	200.00	2,200.00	12,000.00	13,200.00
1/2012	2,000.00	200.00	2,200.00	10,000.00	11,000.00
1/2012	2,000.00	200.00	2,200.00	8,000.00	8,800.00
1/2012	2,000.00	200.00	2,200.00	6,000.00	6,600.00
1/2012	2,000.00	200.00	2,200.00	4,000.00	4,400.00

Amount	Status
2,200.00	
2,200.00	
2,200.00	Feb 29 2012
2,200.00	Apr 02 2012
2,200.00	May 31 2012
2,200.00	Jul 31 2012
2,200.00	Aug 31 2012
2,200.00	Oct 31 2012
2,200.00	Dec 31 2012
2,200.00	Jan 31 2013

**Add Cheque**

\* Amount (Php):

\* Check Payment Method:

\* Bank:  **Browse**

Use this bank for all cheques?: ☐

\* Check Number:

\* Check Date:

The Save button is disabled until all fields are filled and valid.

Save Cancel

Click the Browse button to select a bank from a list of available banks.

# CREATE Loan Application (Schedule – With Checks)

**Add Cheque**

\* Amount (Php): 2200

\* Check Payment Method: Personal Check

\* Bank: MetroBank Browse

Use this bank for all cheques? ☒

\* Check Number: 1234-5678-9

\* Check Date: 11/30/2011

Save Cancel

Checking this box will set all other checks' banks to be the same as the one set in this form.

Click the Save button to save the changes made for this check.

# CREATE Loan Application (Schedule – With Checks)

Month 4	04/02/2012	2,000.00	200.00	2,200.00	12,000.00	1
Month 5	05/31/2012	2,000.00	200.00	2,200.00	10,000.00	1
Month 6	07/31/2012	2,000.00	200.00	2,200.00	8,000.00	8
Month 7	08/31/2012	2,000.00	200.00	2,200.00	6,000.00	6
Month 8	10/31/2012	2,000.00	200.00	2,200.00	4,000.00	4

Associated Checks			
Check Number	Amount	Check Date	Bank Name
1234-5678-9	2,200.00	Nov 30 2011	MetroBank
	2,200.00	Jan 02 2012	MetroBank
	2,200.00	Feb 29 2012	MetroBank
	2,200.00	Apr 02 2012	MetroBank
	2,200.00	May 31 2012	MetroBank
	2,200.00	Jul 31 2012	MetroBank
	2,200.00	Aug 31 2012	MetroBank
	2,200.00	Oct 31 2012	MetroBank
	2,200.00	Dec 31 2012	MetroBank
	2,200.00	Jan 31 2013	MetroBank

**All checks are set to the same box because we checked the 'Use same bank for all checks' option.**

Form is valid.

# CREATE Loan Application (Schedule – With Checks)

Home
Loan Applications
Create Loan Application Record

Save
Close

Borrowers Information
Loan Application Details
Outstanding Loans
Fees and Co-Borrowers
Guarantors, Collaterals and Submitted Documents
Schedule and Cheques

### Amortization Schedule

Add Post Dated Checks: ☒ \*Payment Start Date: 11/30/2011 Generate Schedule Print Temporary Schedule

Unit	Payment Due Date	Principal Due	Interest Due	Total	Principal Balance	Total Loan Balance
Month 3	02/29/2012	2,000.00	200.00	2,200.00	14,000.00	15,400.00
Month 4	04/02/2012	2,000.00	200.00	2,200.00	12,000.00	13,200.00
Month 5	05/31/2012	2,000.00	200.00	2,200.00	10,000.00	11,000.00
Month 6	07/31/2012	2,000.00	200.00	2,200.00	8,000.00	8,800.00
Month 7	08/31/2012	2,000.00	200.00	2,200.00	6,000.00	6,600.00
Month 8	10/31/2012	2,000.00	200.00	2,200.00	4,000.00	4,400.00
Month 9	12/31/2012	2,000.00	200.00	2,200.00	2,000.00	2,200.00
Month 10	01/31/2013	2,000.00	200.00	2,200.00	0.00	0.00

### Associated Checks



Check Number	Amount	Check Date	Bank Name	Status
1254-5070-9	2,200.00	Nov 30 2011	MetroBank	
125874-8956	2,200.00	Jan 02 2012	MetroBank	
1538653	2,200.00	Feb 29 2012	MetroBank	
4536896	2,200.00	Apr 02 2012	MetroBank	
47532768	2,200.00	May 31 2012	MetroBank	
789689	2,200.00	Jul 31 2012	MetroBank	
7867586	2,200.00	Aug 31 2012	MetroBank	
78678	2,200.00	Oct 31 2012	MetroBank	
798689687	2,200.00	Dec 31 2012	MetroBank	
786786896	2,200.00	Jan 31 2013	MetroBank	

Form is valid. After generating the schedule and checks, the status message will inform you that the loan is ready to be saved.




# CREATE Loan Application (Saving)

[Home](#) [Loan Applications](#) [Create Loan Application Record](#)

 Save  Close **Click the Save button to create the loan application.**

**Borrowers Information** Loan Application Details Outstanding Loans Fees and Co-Borrowers Guarantors, Collaterals and Subm

**Basic Information**



\*Name: dela Cruz, Juan

District: Rizal District

Station Number: 1

Customer Status: Active

Gender: Male

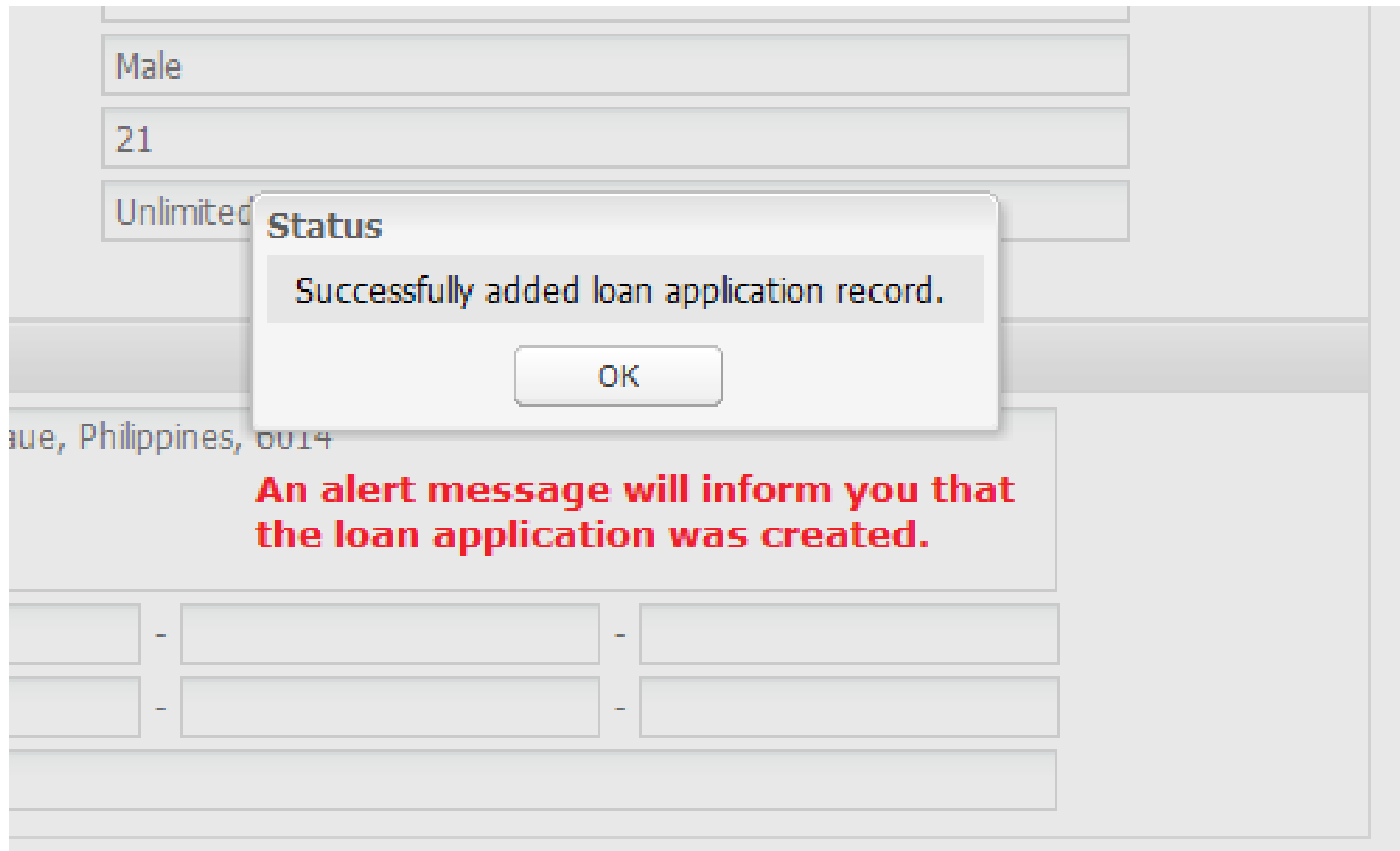
Age: 21

Credit Limit: Unlimited

**Contact Information**

Primary Home Address: San Roque, Mandaue, Philippines, 6014

# CREATE Loan Application (Saving)



The image shows a web form for creating a loan application. The form includes several input fields: a gender dropdown menu with 'Male' selected, an age input field with '21', and a loan type dropdown menu with 'Unlimited' selected. A modal dialog box is displayed in the center, titled 'Status', with the message 'Successfully added loan application record.' and an 'OK' button. Below the dialog, a red text message states: 'An alert message will inform you that the loan application was created.' The form also includes a text input field for a location, partially visible as 'ue, Philippines, 0014', and a table with two rows of input fields separated by hyphens.

Male

21

Unlimited

**Status**

Successfully added loan application record.

OK

ue, Philippines, 0014

**An alert message will inform you that the loan application was created.**

	-		-	
	-		-	

# CREATE Loan Application (Saving)

Home Loan Applications

Delete Open New Approve Cancel Reject Print Application Form

Search By: Search... From: To: 10/8/2011 Search Filter By:

Loan Application Id	Borrower's Name	Loan Product	Collateral Requirement	Application Date	Status
1	dela Cruz, Juan	Salary Loan	Secured	10/07/2011	Closed
3	dela Cruz, Juan	Salary Loan	Secured	10/07/2011	Closed
4	dela Cruz, Juan	Salary Loan	Secured	10/07/2011	Pending: Approval

The loan application is then added in the Loan Applications List with the status of Pending for Approval