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User Manual

Client Tracking System

By

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Contents

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This manual provides detailed steps to use Client Tracking System functionalities for tow different types of users. The Administrator and Call Center employee.

1. Login

In order to be able to access the system, all users need to be registered to the system by the Administrator.

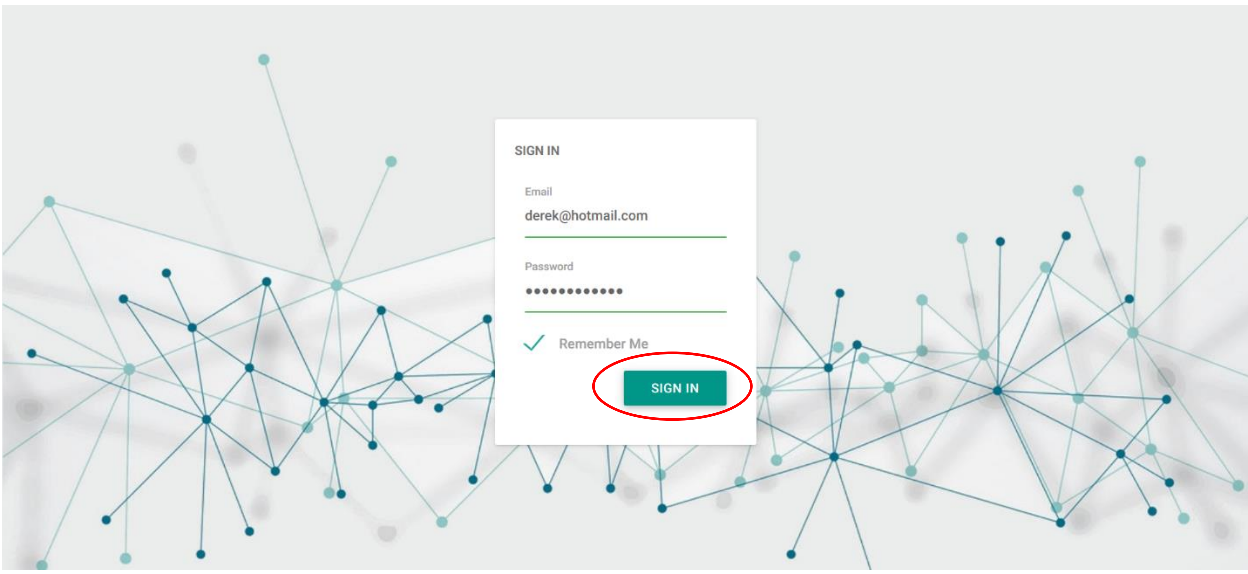

FIGURE 1- LOGIN PAGE

Fill in the login form with your registered Email address and password. Check the “Remember Me” box in order for your Email and password to be saved for future logins as in Figure 1. Then Click on “SIGN IN” button.

2. User Profile

1. In order to edit user profile click on your email on the left side in the main menu, as shown in Figure 2.

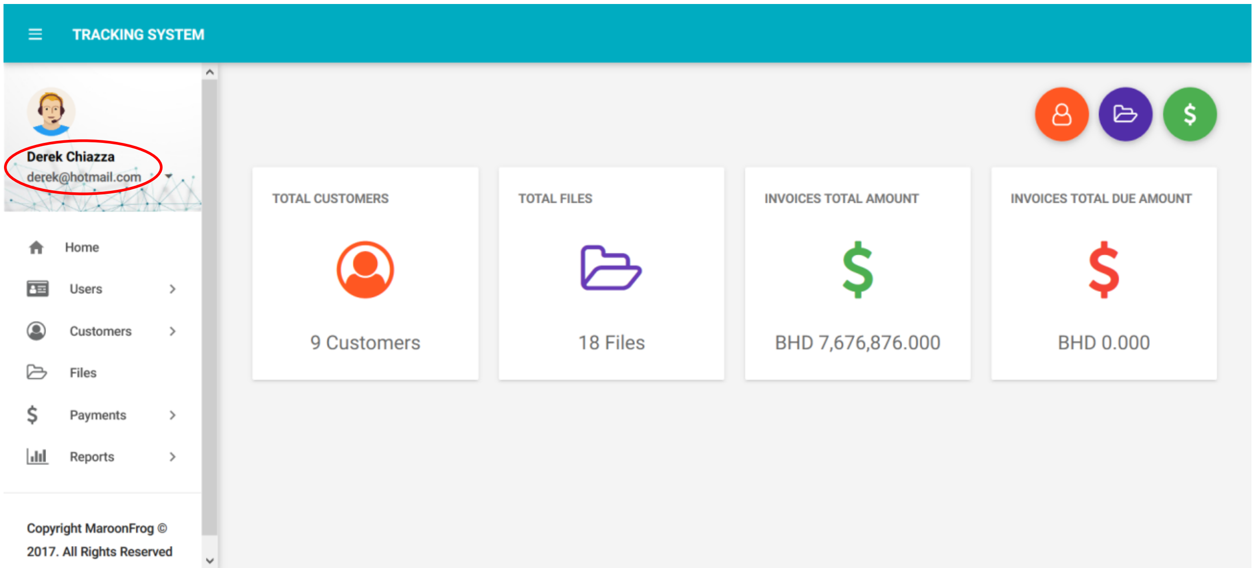

FIGURE 2 - USER PROFILE 1

2. Click on "My Profile" option on the new menu, as shown in Figure 3.

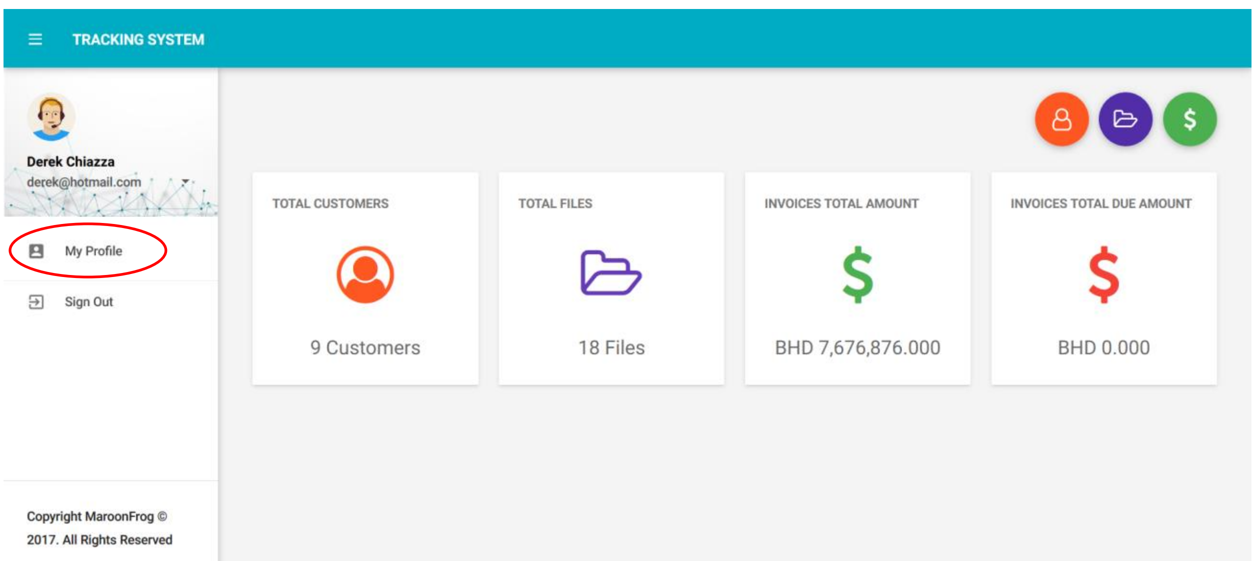

FIGURE 3 - USER PROFILE 2

3. Edit the required fields you wish to edit then click on the "Update" button, as shown in Figure 4.

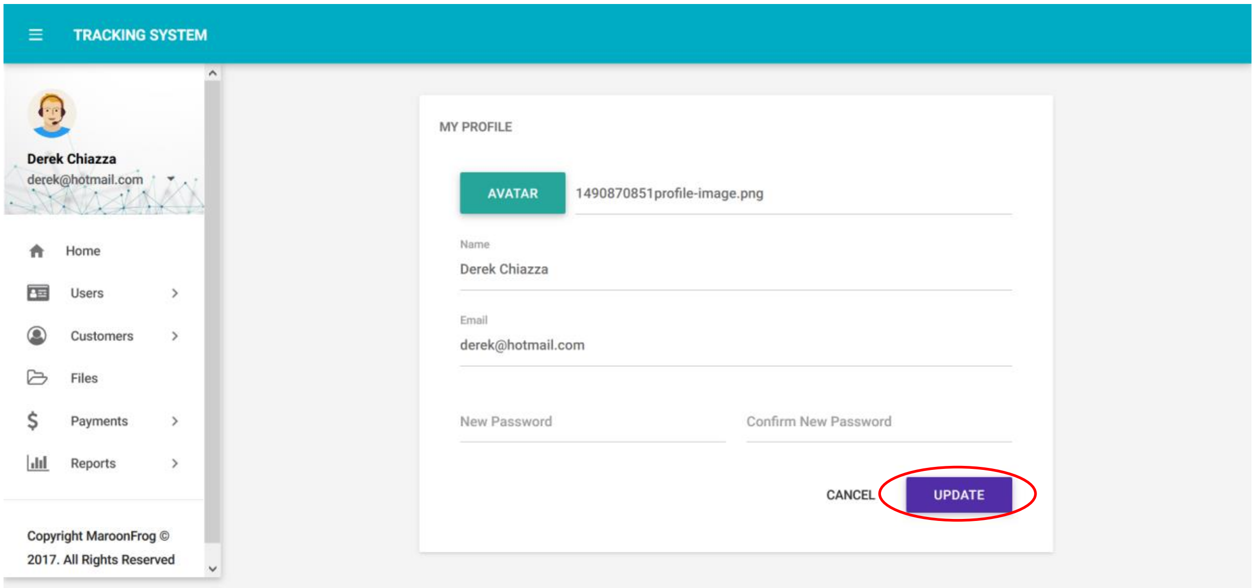

FIGURE 4 - USER PROFILE 3

3. Home Page

- Administrator

After a successful login the Administrator will be redirected to the Administrator home page, as shown in Figure 5.

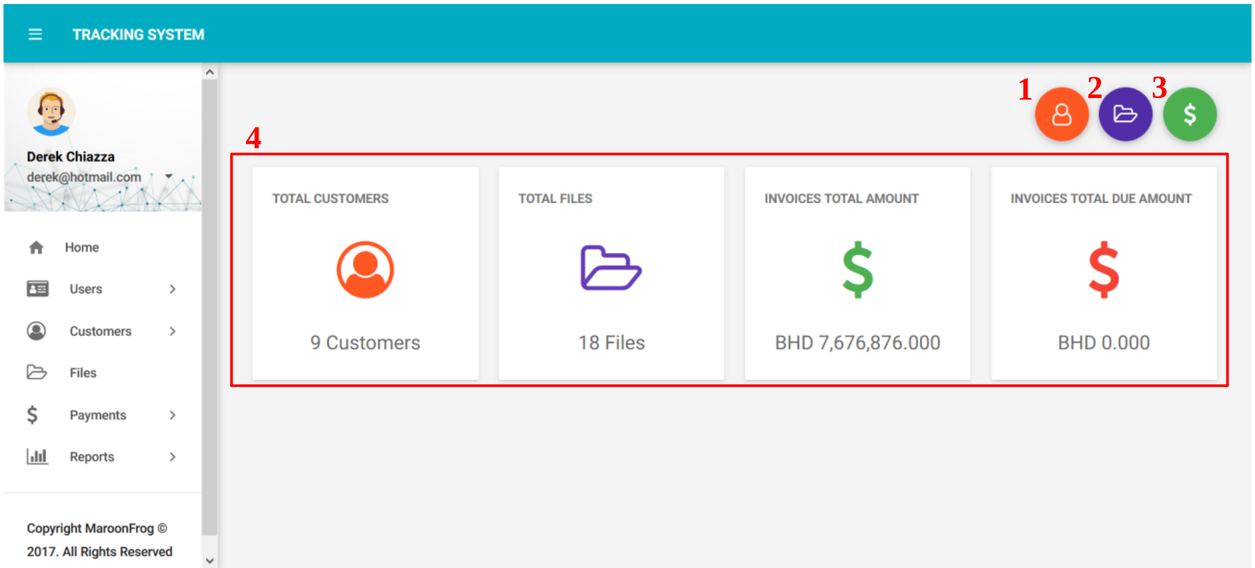

FIGURE 5 - HOME PAGE (ADMINISTRATOR)

The Administrator Home page contains the following:

1. Link to view the customer accounts on the system.
2. Link to view the files created on the system.
3. Link to view the invoices created on the system.
4. A summary of the total customers, total files, invoices total amount and total due amount of all registered accounts on the system

- ## Call Center

After a successful login the Call Center will be redirected to the Call Center home page, as shown in Figure 6.

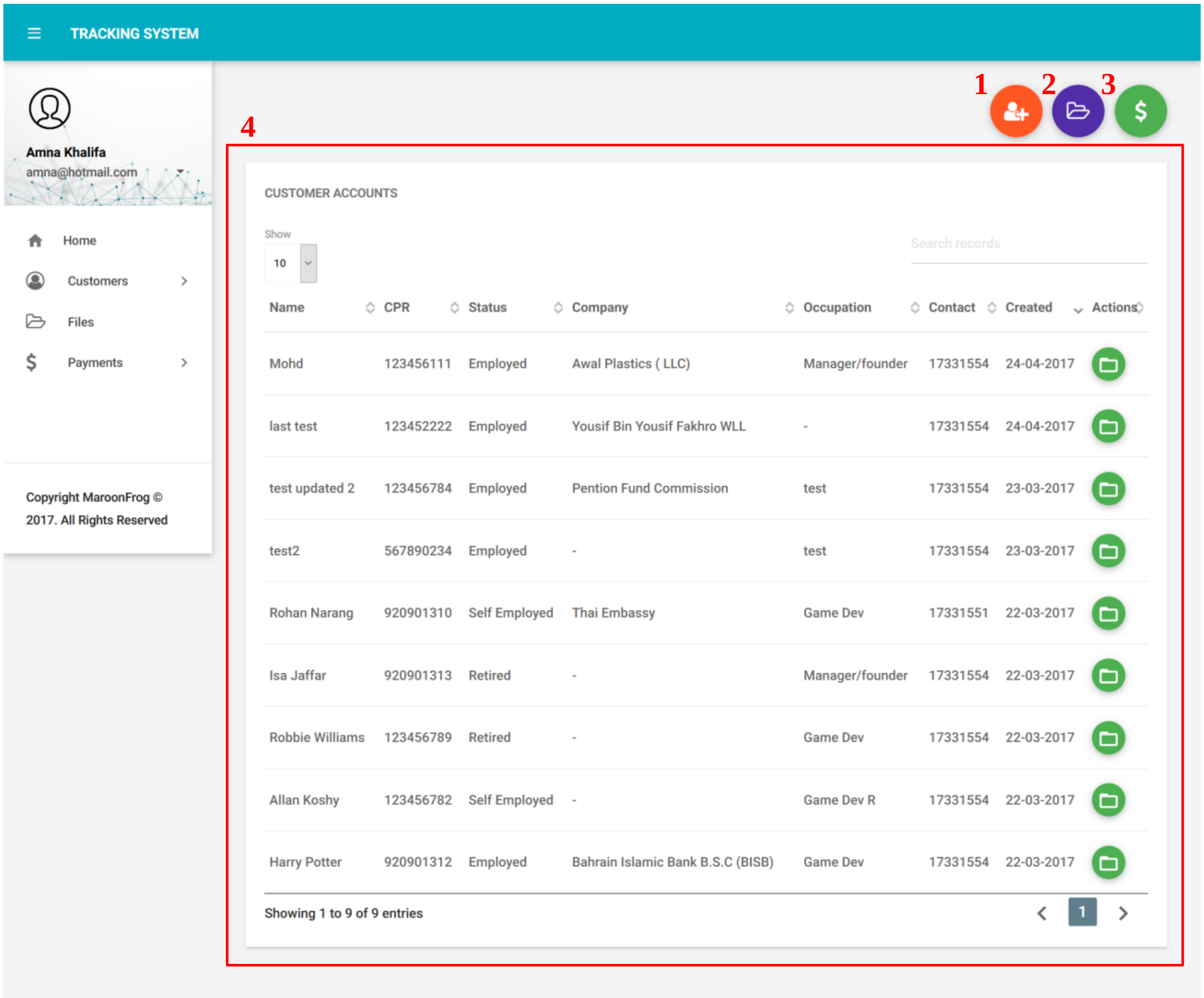

FIGURE 6 - HOME PAGE (CALL CENTER)

The Call Center Home page contains the following:

1. Link to create a customer account on the system.
2. Link to view the files created on the system.
3. Link to view the invoices created on the system.
4. A list of the customer accounts created on the system.

4. Users – Administrator

View Users

In order for the Administrator to view the users added to the system, click on "View Users" on the main menu under "Users" heading, as shown in Figure 7.

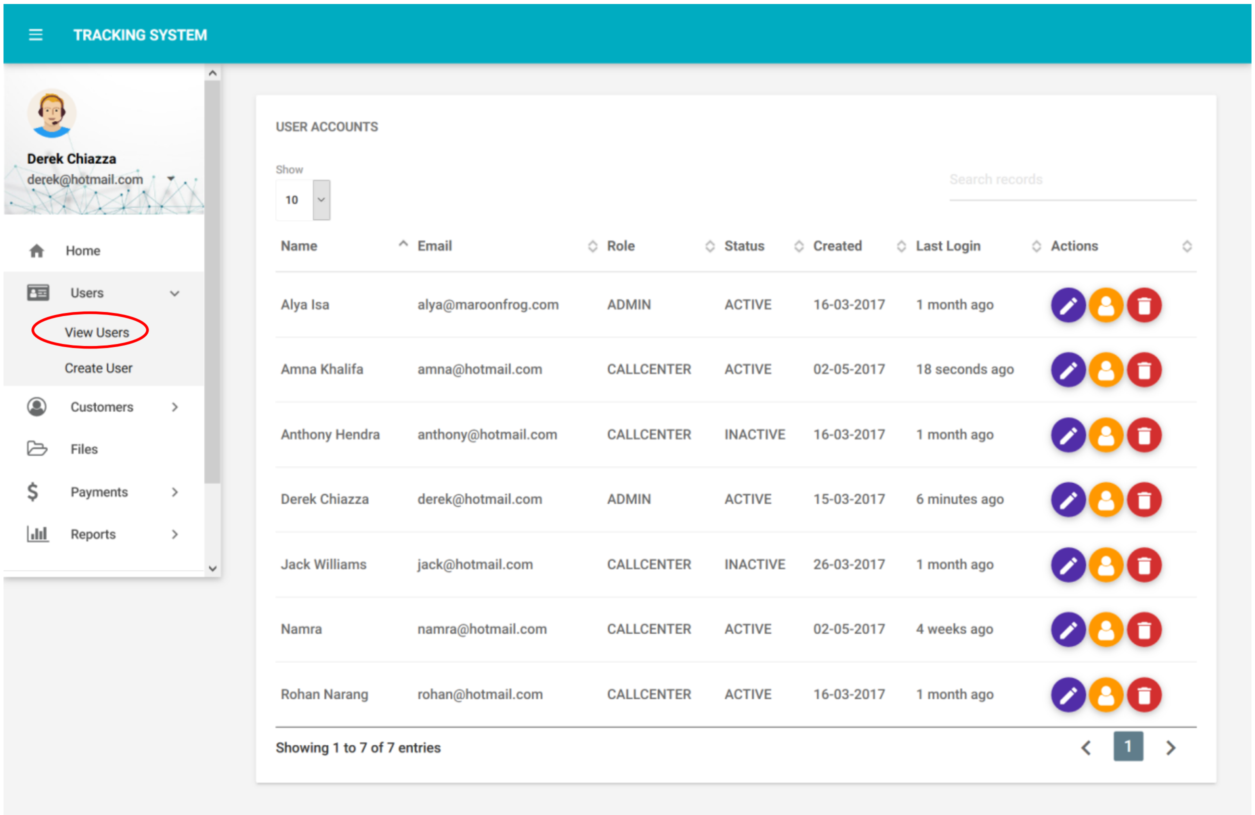

FIGURE 7 - VIEW USERS

Edit User Status

1. To edit a user account status, click on the "Edit Status" button on the user's row, as shown in Figure 8. P.S – Active accounts have the ability to access the system and the inactive ones don't have the ability to access the system.

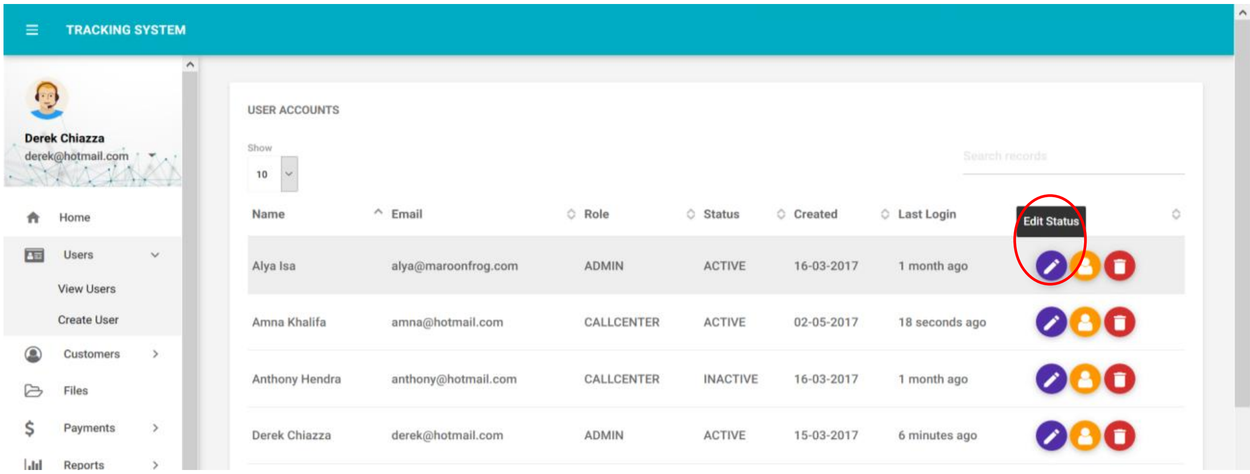

FIGURE 8 - EDIT USER 1

2. After clicking on the "Edit Status" button. Click on Update button in the pop-up window in order to update the user status, as shown in Figure 9.

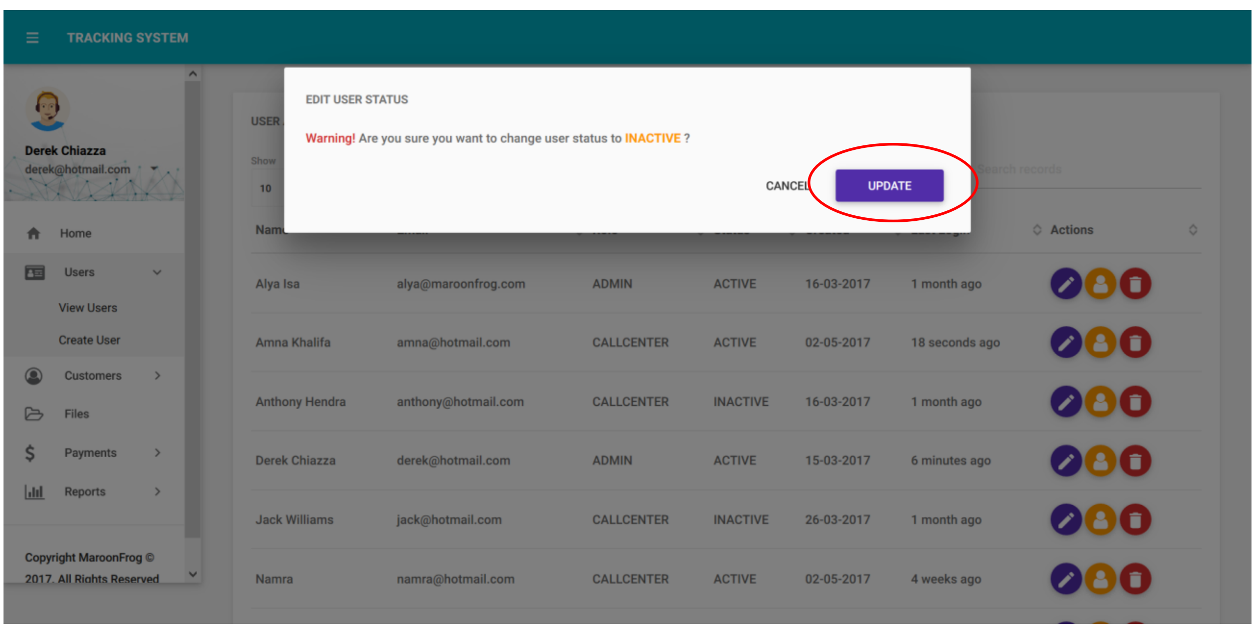

FIGURE 9 - EDIT USER 2

Edit Role

1. To edit User Role, click on "Edit Role" button on the user's row, as shown on Figure 10.

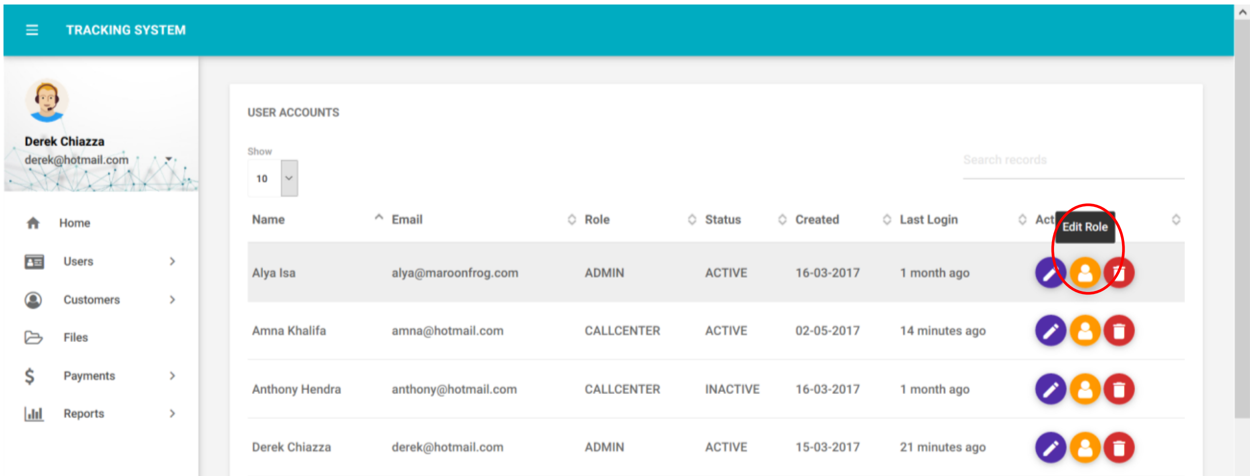

FIGURE 10 - EDIT ROLE 1

2. Choose the new role you'd like to change the user into in the pop-up window and then click on "Update" button, as shown on Figure 11. P.S – changing the user's role would change their permissions on the system.

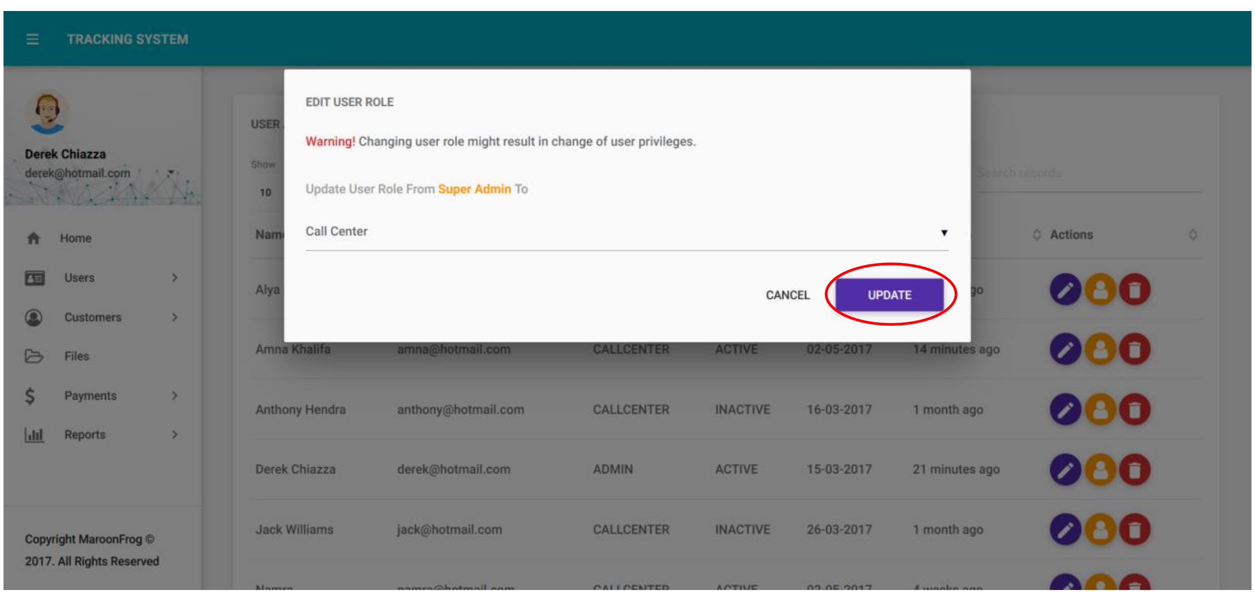

FIGURE 11 - EDIT ROLE 2

- ## Delete User

1. In order to delete a user off the system click on the “Delete” button shown in the user’s row, as shown on Figure 12.

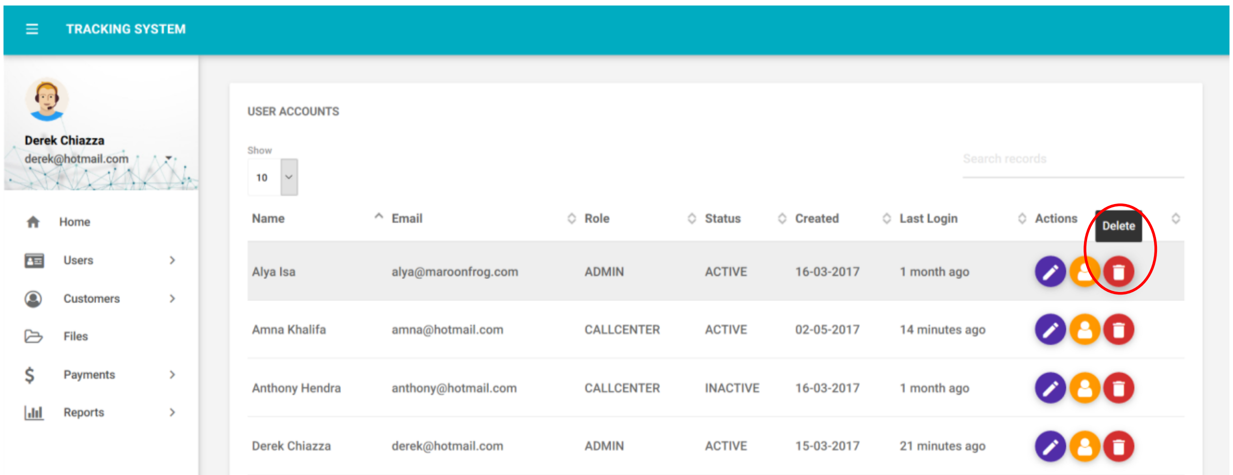

FIGURE 12 - DELETE USER 1

2. Click on the “Delete” button in the pop-up window, as shown on Figure 13. P.S – deleting an account results in the user not being able to access the system again.

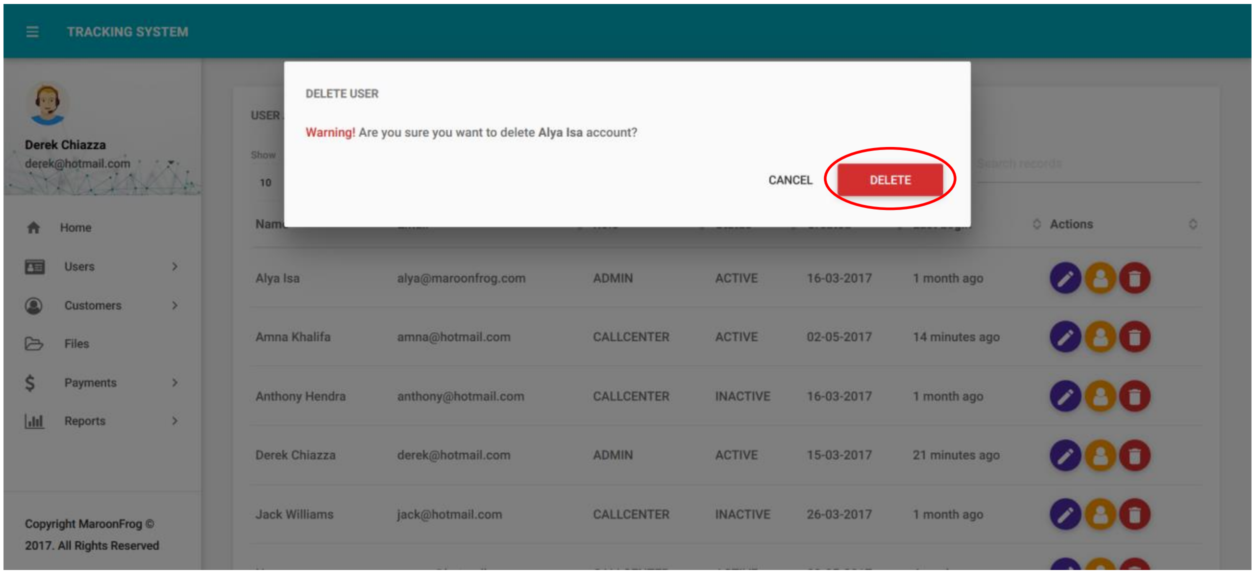

FIGURE 13 - DELETE USER 2

- ## Create User

In order to create a new user account, click on "Create User" on the main menu under the "Users" heading. Fill in the form with the necessary information in order to create the user then click on the "Save" Button shown on Figure 14.

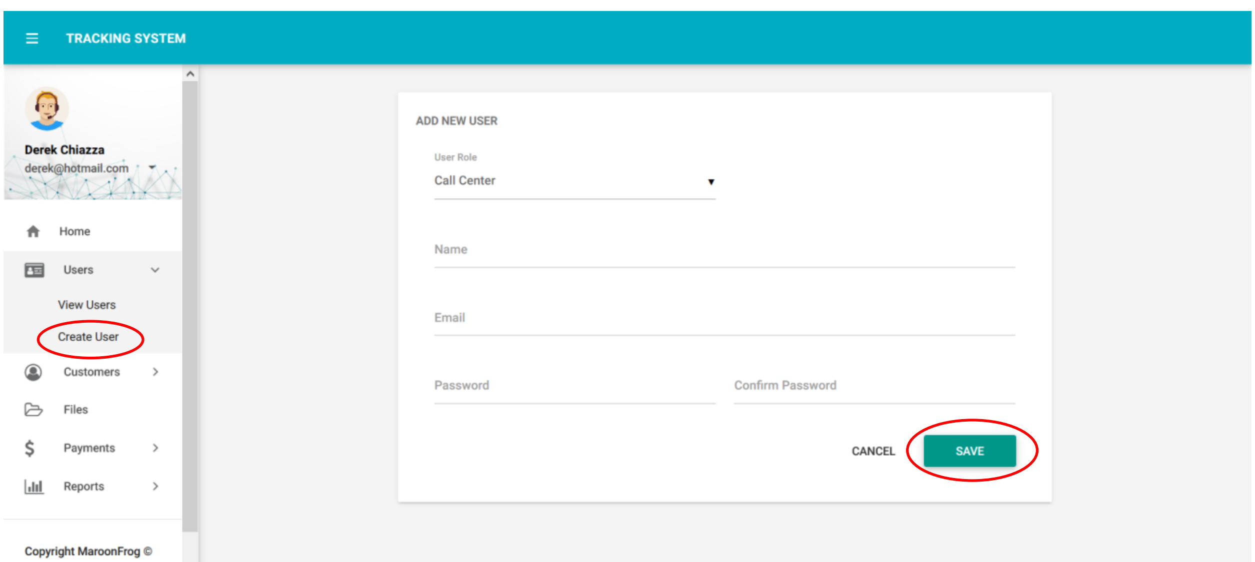

FIGURE 14 - CREATE USER

5. Customers

▪ View Customers

In order to view customer accounts in the system, click on “View Customers” on the main menu under “Customers” heading, as shown in Figure 15.

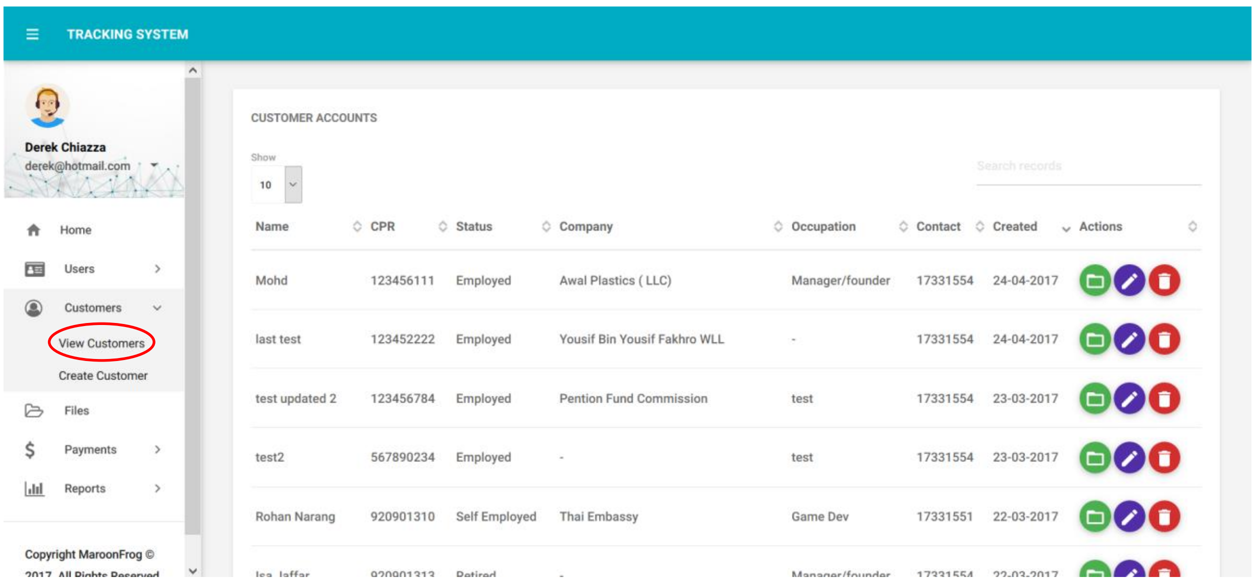

FIGURE 15 - VIEW CUSTOMERS

▪ Edit Customer - Administrator

1. To edit a customer account click on the “Edit” button shown on the customer account row, as shown in Figure 16.

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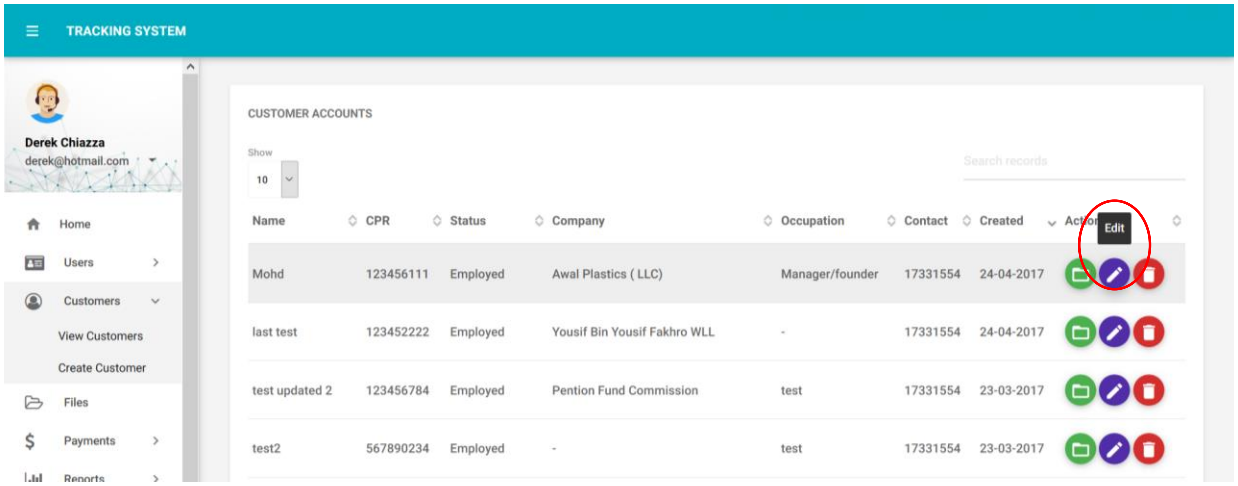

FIGURE 16 - EDIT CUSTOMER 1

2. Edit the required fields then click on “Update” button, as shown in Figure 17.

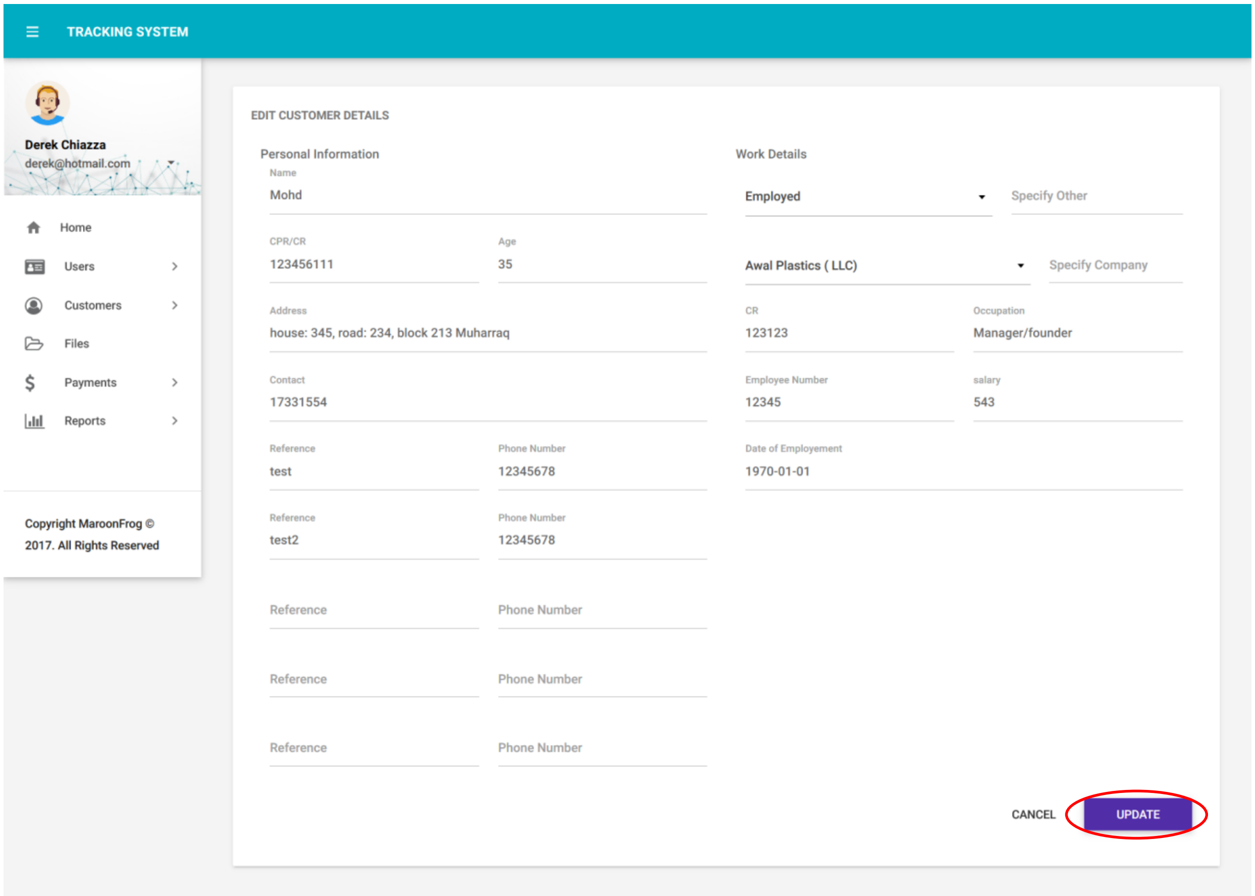

FIGURE 17 - EDIT CUSTOMER 2

- ## Delete Customer - Administrator

1. In order to delete a customer account off the system click on the "Delete" button shown in the customer's row, as shown on Figure 18.

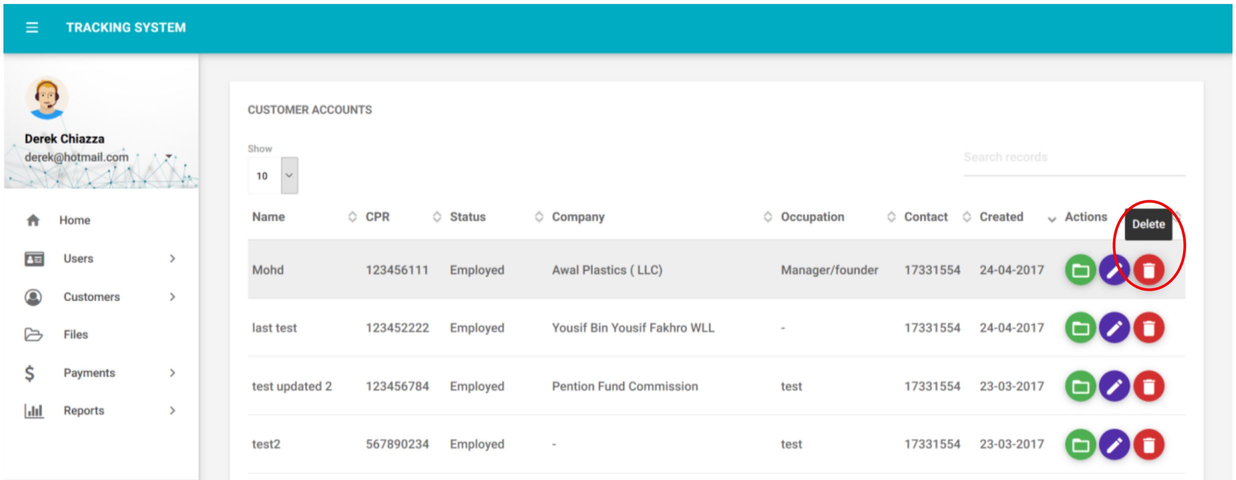

FIGURE 18 - DELETE CUSTOMER 1

2. Click on "Delete" button on the pop-up window as shown in Figure 19. P.S – if the customer account has a file in the system then you will not be permitted to delete the account.

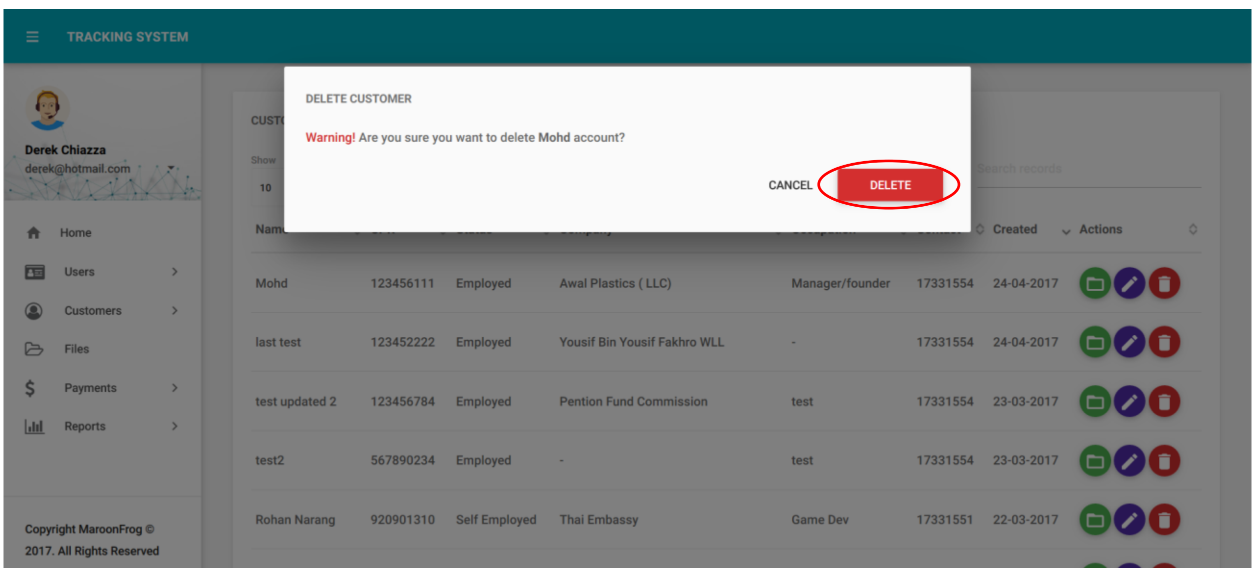

FIGURE 19 - DELETE CUSTOMER 2

- ## Create Customer

To create a new customer account, click on "Create Customer" on the main menu under the "Customers" header. Fill in the required fields marked with (*) and then click on "Save" button, as shown in Figure 20.

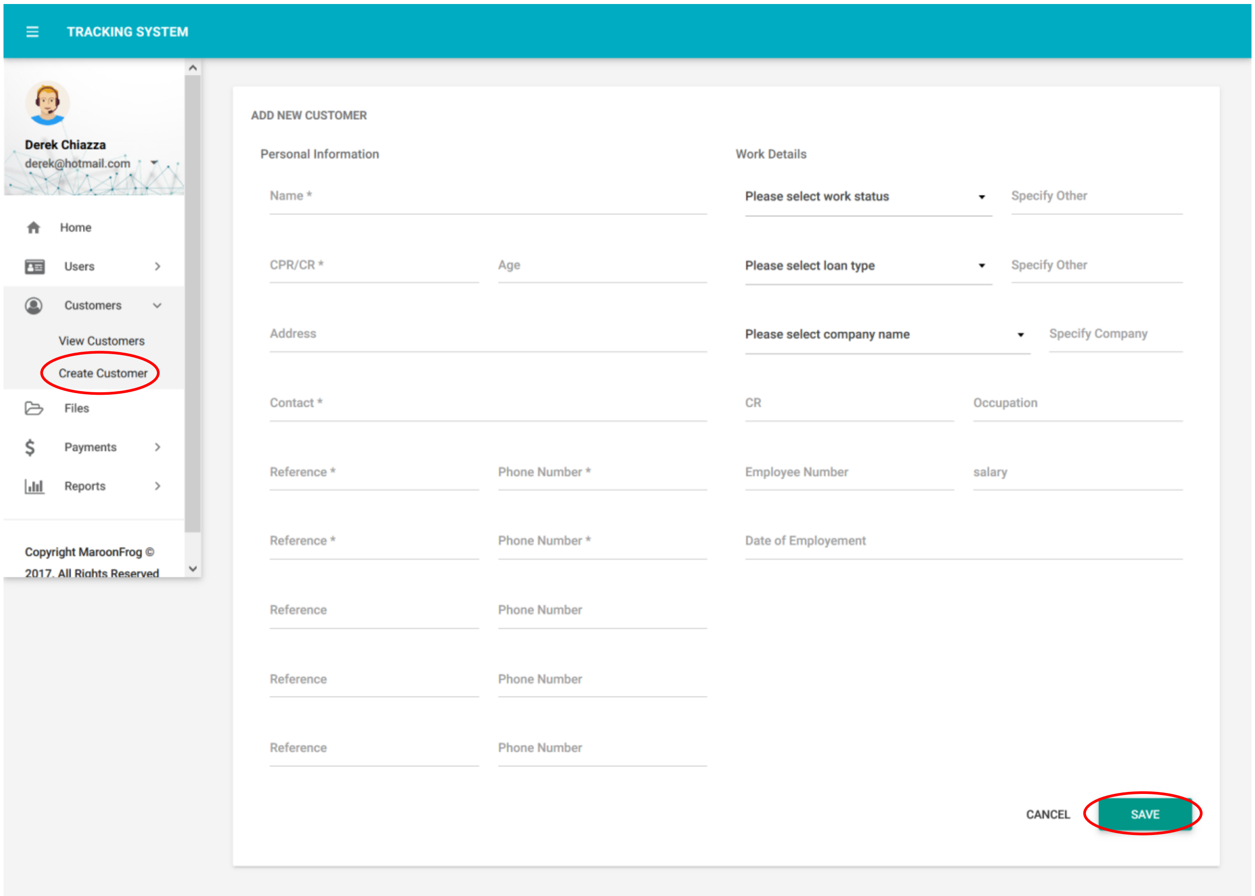

FIGURE 20 - CREATE CUSTOMER

6. Files

▪ Create a File

1. Click on “Create File” button shown on the customer’s account row, as shown in Figure 21.

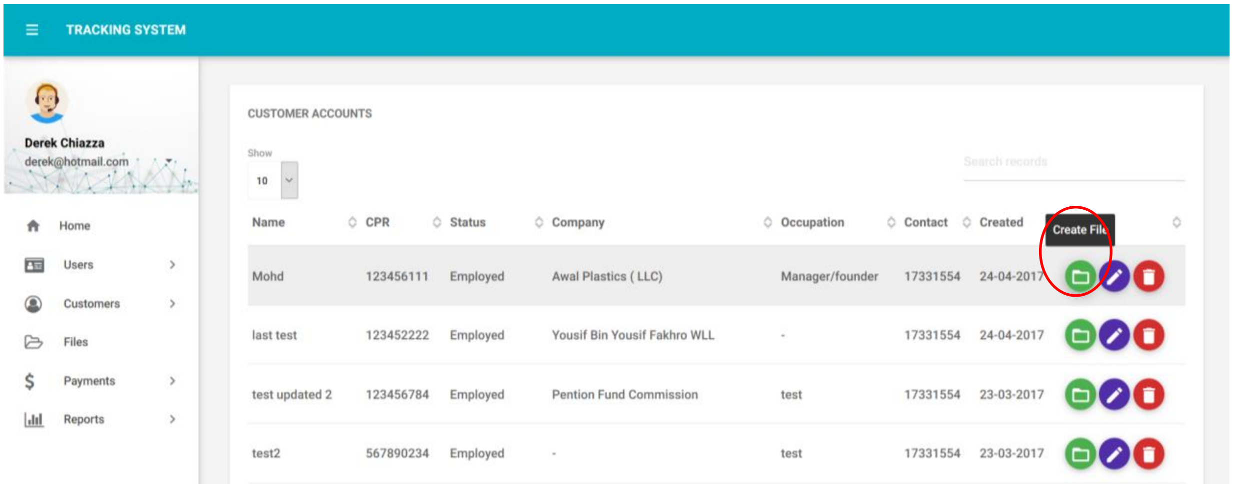

FIGURE 21 - CREATE FILE 1

2. Choose loan type from the list and check the documents provided by the customer on the list then click on "Next" button, as shown in Figure 22.

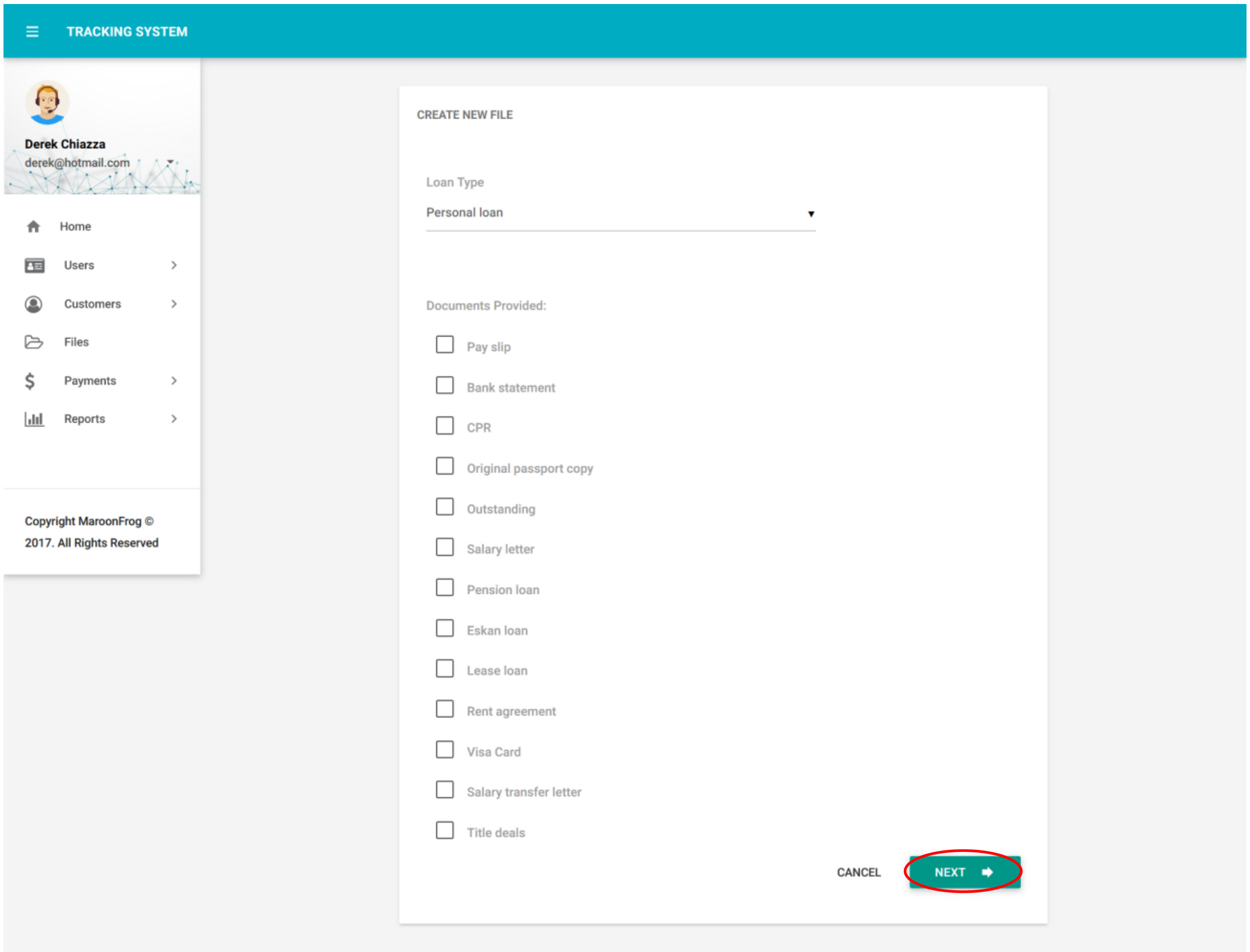

FIGURE 22 - CREATE FILE 2

3. Enter the total amount to be shown on the contract, you can also edit the contact number as required then click on “Create” button, as shown in Figure 23.

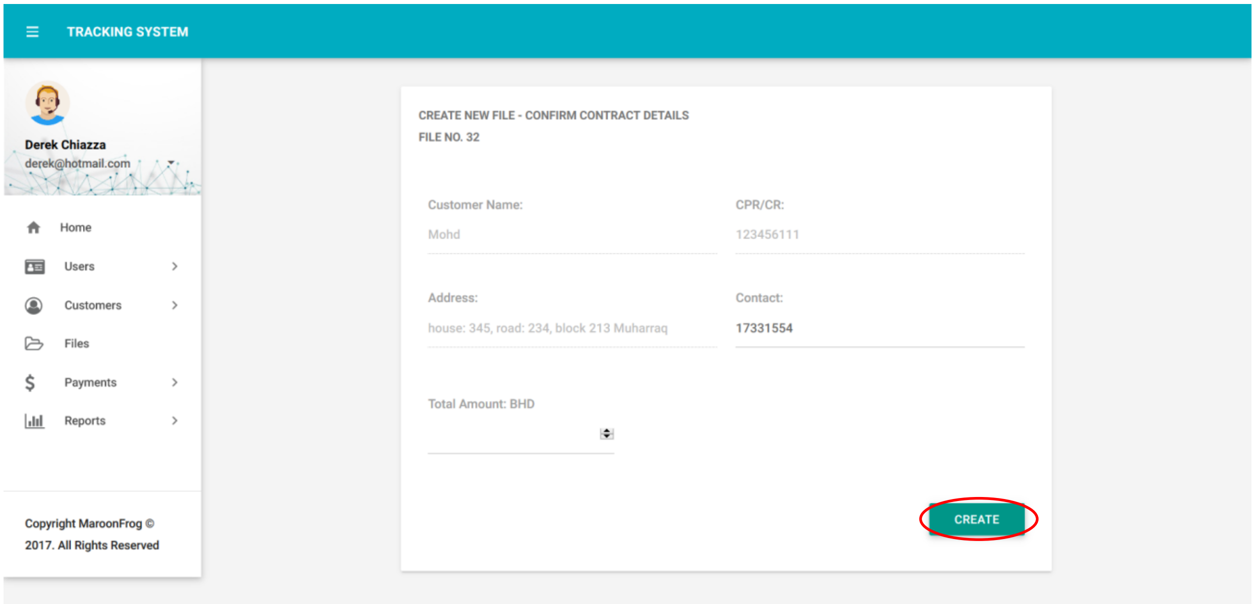

FIGURE 23 - CREATE FILE 3

4. Press on the "Save" button in order to save the contract and receive a PDF version of it, as shown in Figure 24 and 25.

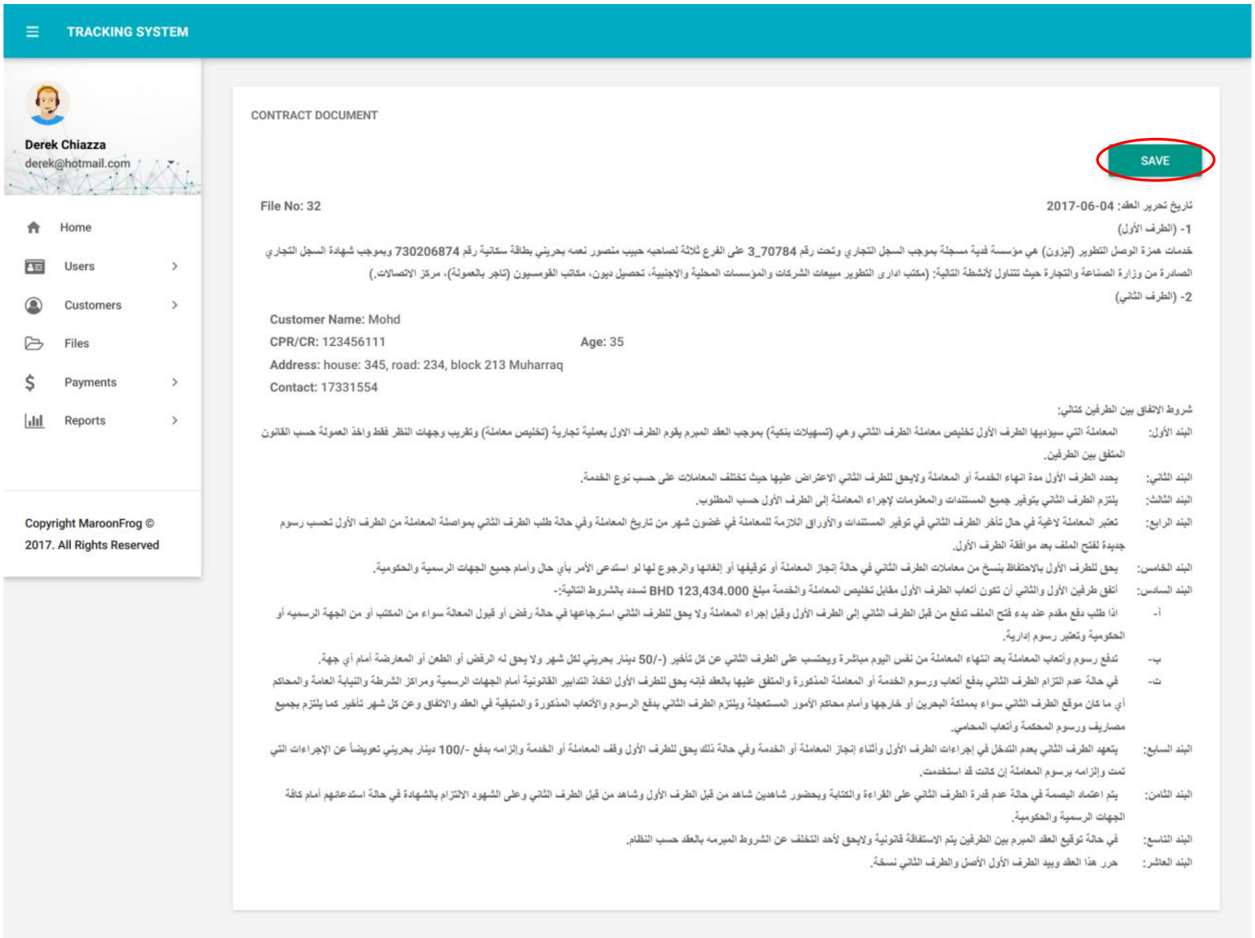

FIGURE 24 - CREATE FILE 4

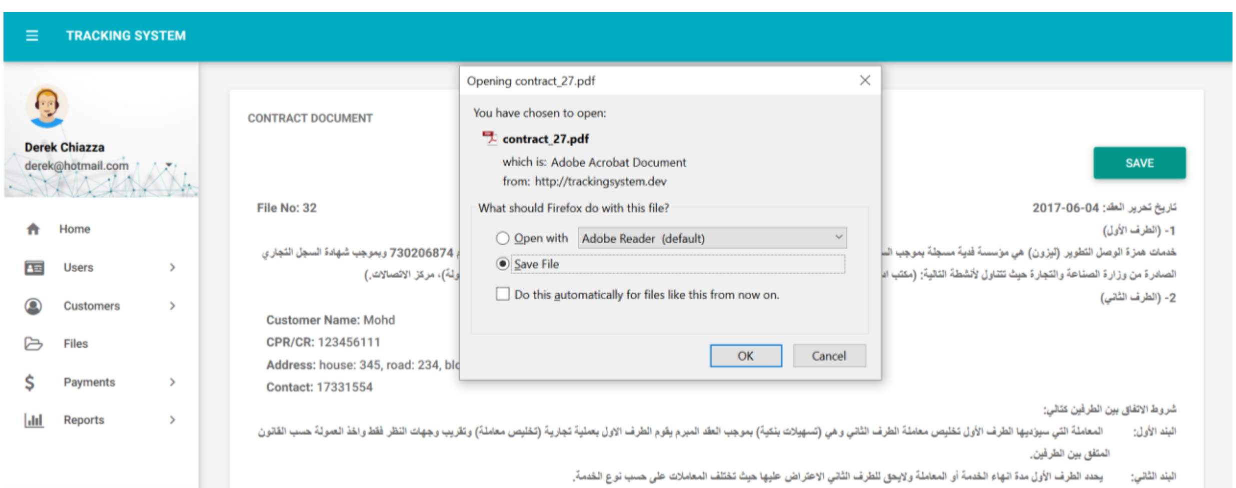

FIGURE 25 - CREATE FILE 5

- ## View Files

In order to view the files created, click on “Files” on the main menu, as shown in Figure 26.

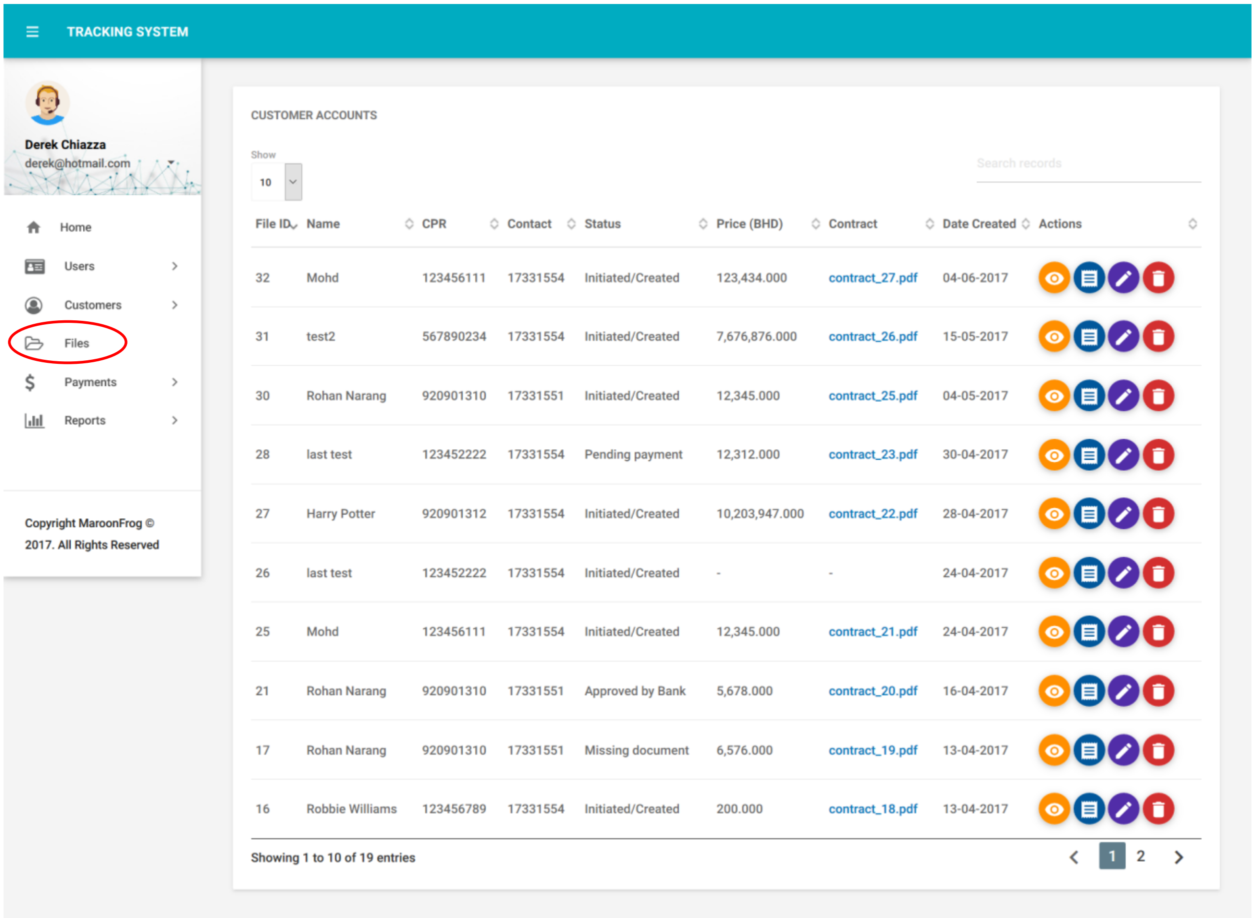

FIGURE 26 - VIEW FILES

- ## Edit File Status

1. To edit the file status click on “Edit Status” button on the file’s row, as shown in Figure 27.

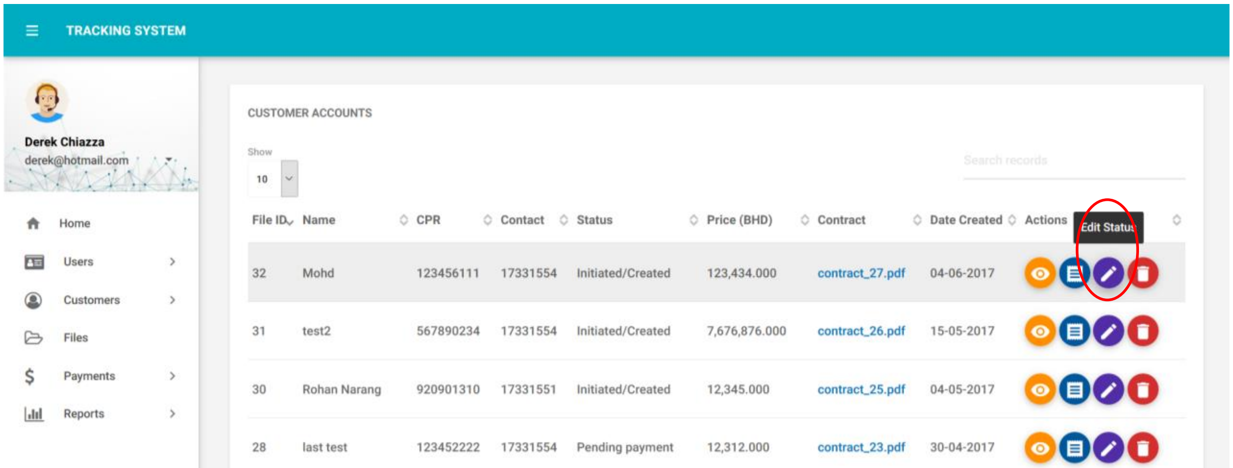

FIGURE 27 - EDIT FILE STATUS 1

2. Choose the file status from the list then click on the "Update" button, as shown in Figure 28.

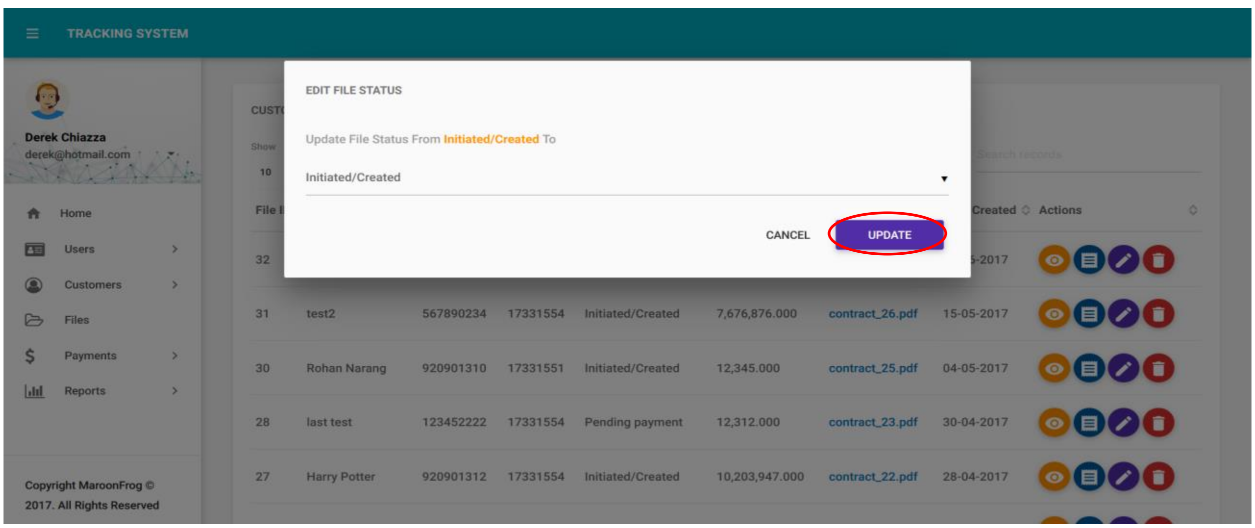

FIGURE 28 - EDIT FILE STATUS 2

- ## Delete File

1. To delete a file click on "Delete" button shown on the file's row, as shown in Figure 29.

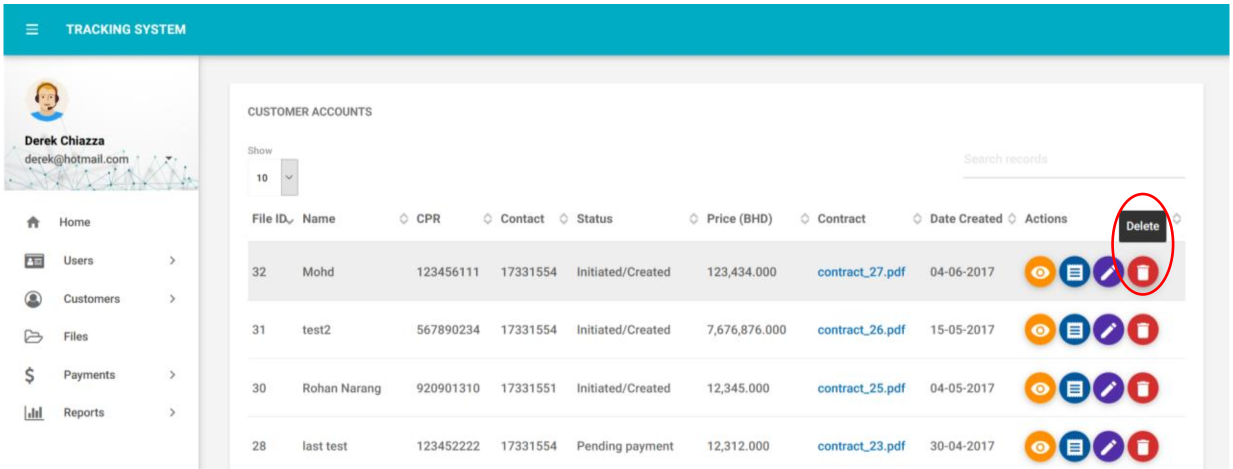

FIGURE 29 - DELETE FILE 1

2. Click on "Delete" button in the pop-up window, as shown in Figure 30. P.S – if invoices are created for the file you will not be permitted to delete the file.

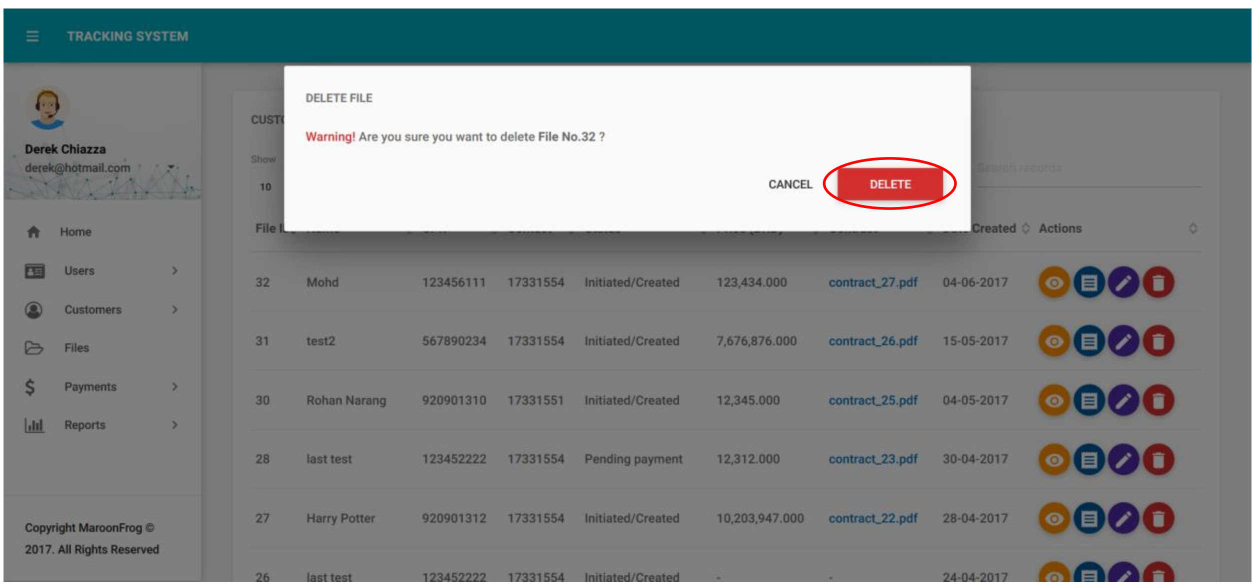

FIGURE 30 - DELETE FILE 2

- View File Details

1. To view file details click on "View" button on the file's row, as shown in Figure 31.

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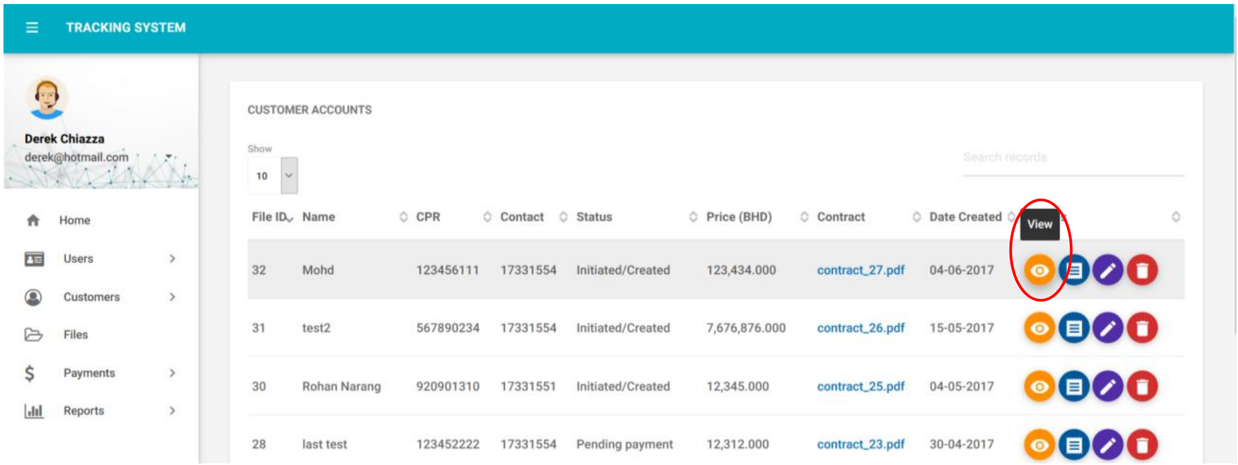

FIGURE 31 - VIEW FILE 1

2. On the view file details page you can view File Information, Bank Information, and Comments, as shown in Figure 32, 33 and 34.

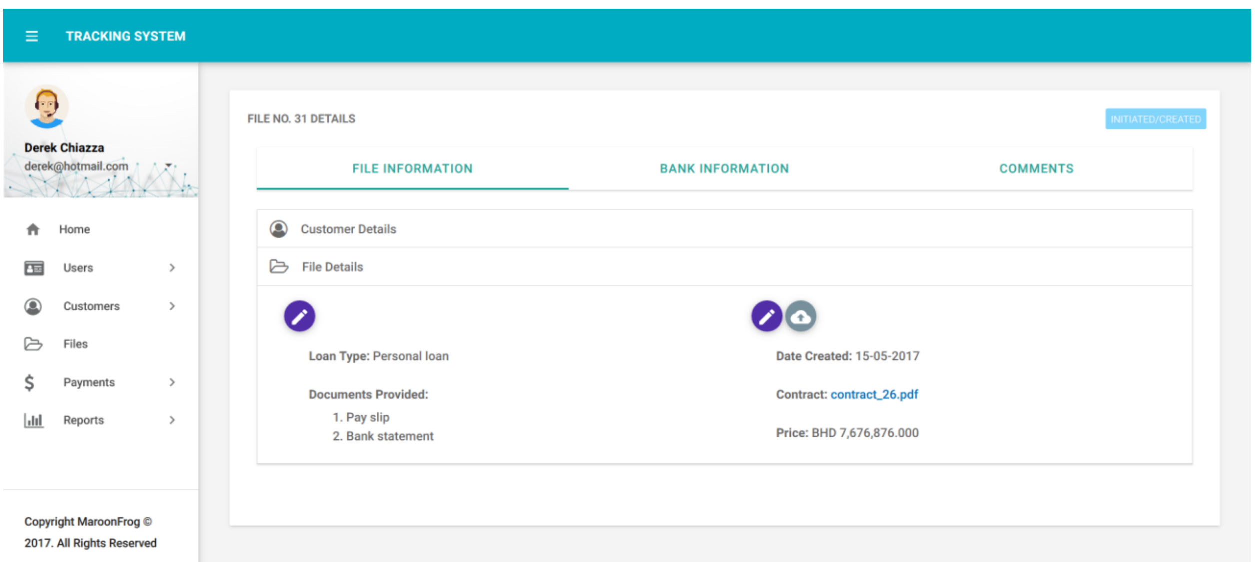

FIGURE 32 - VIEW FILE 2

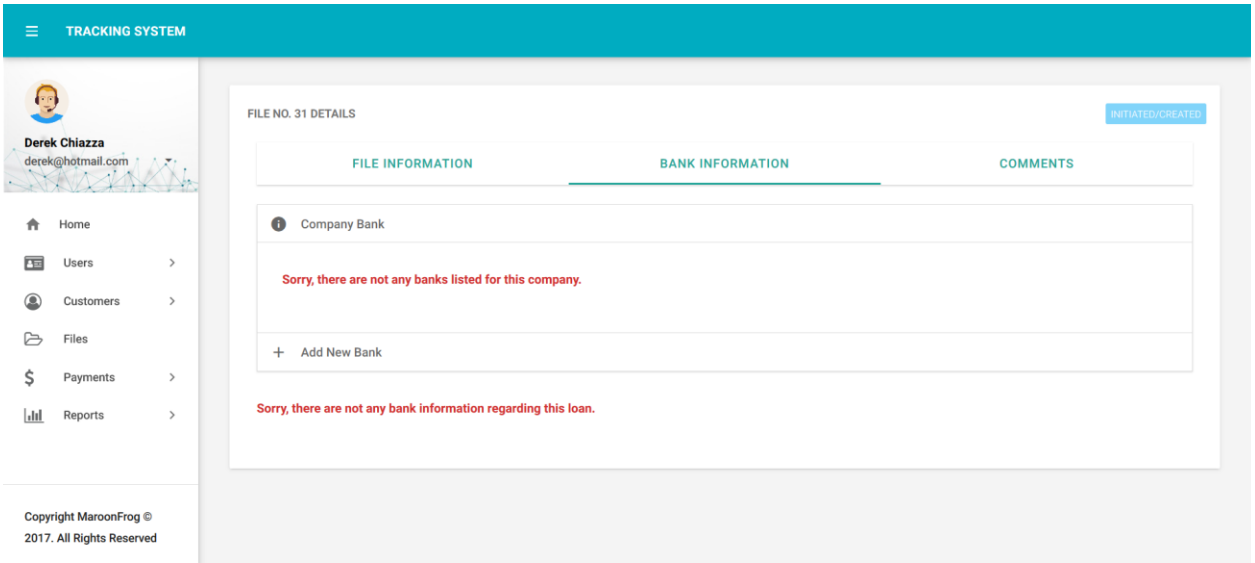

FIGURE 33 - VIEW FILE 3

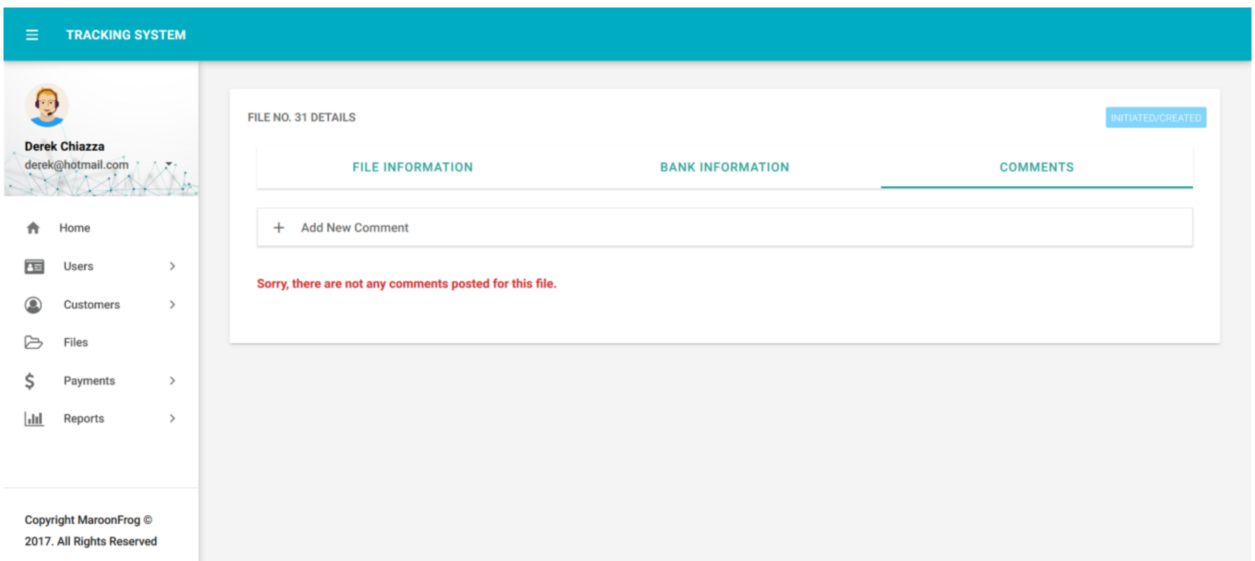

FIGURE 34 - VIEW FILE 4

3. To edit provided documents list click on the “Edit” button above Loan Type, as shown in Figure 35.

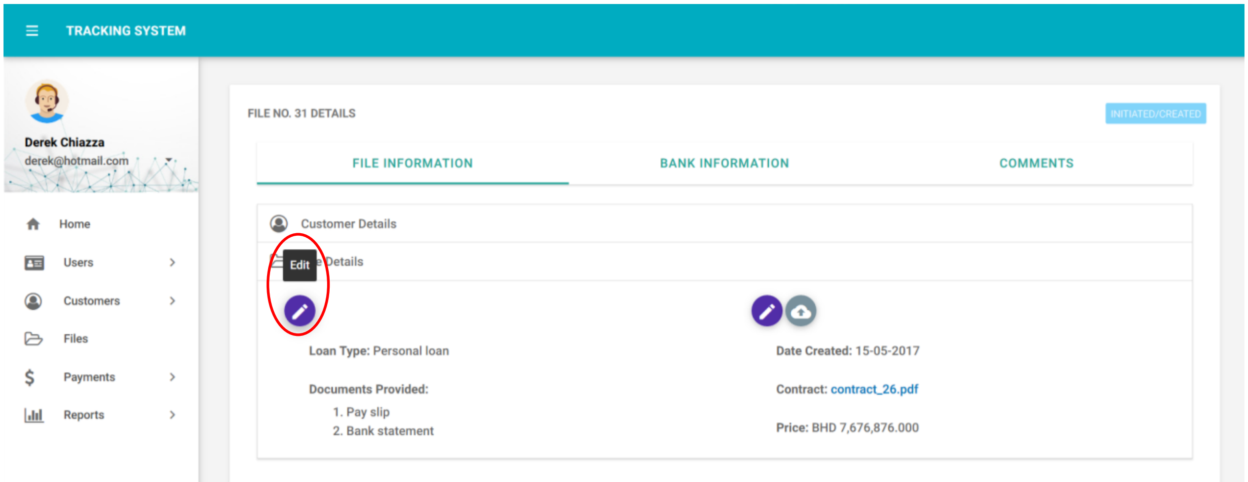

FIGURE 35 - VIEW FILE 5

4. Check the boxes of the documents provided by the customer then click on "Save" button, as shown in Figure 36.

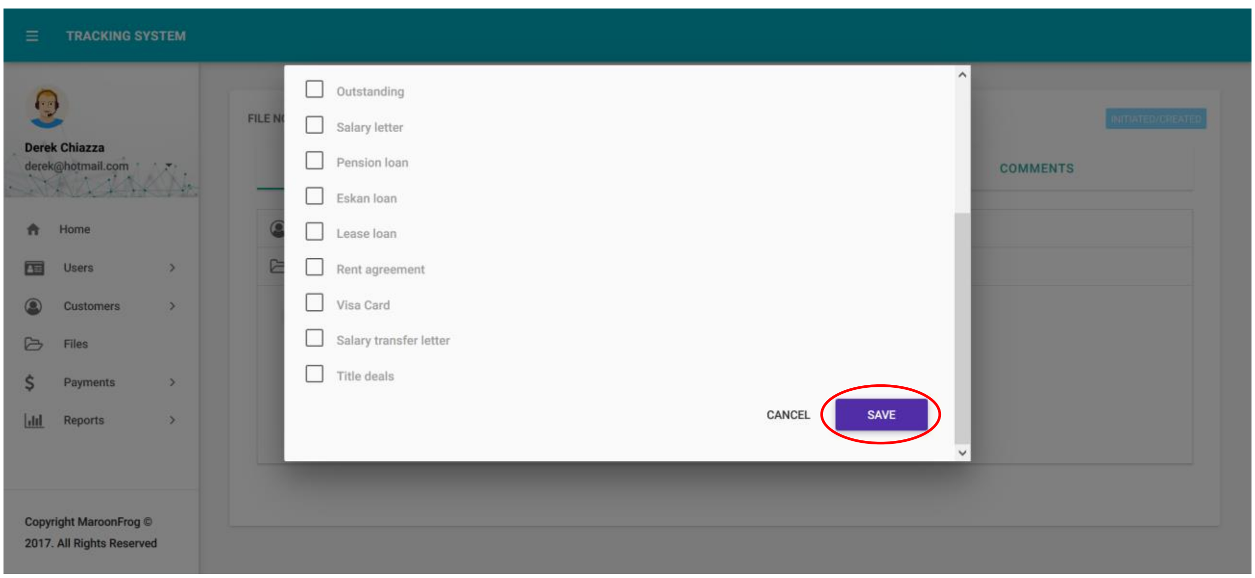

FIGURE 36 - VIEW FILE 6

5. To update the contract click on the "Edit" button above the contract, as shown in Figure 37.

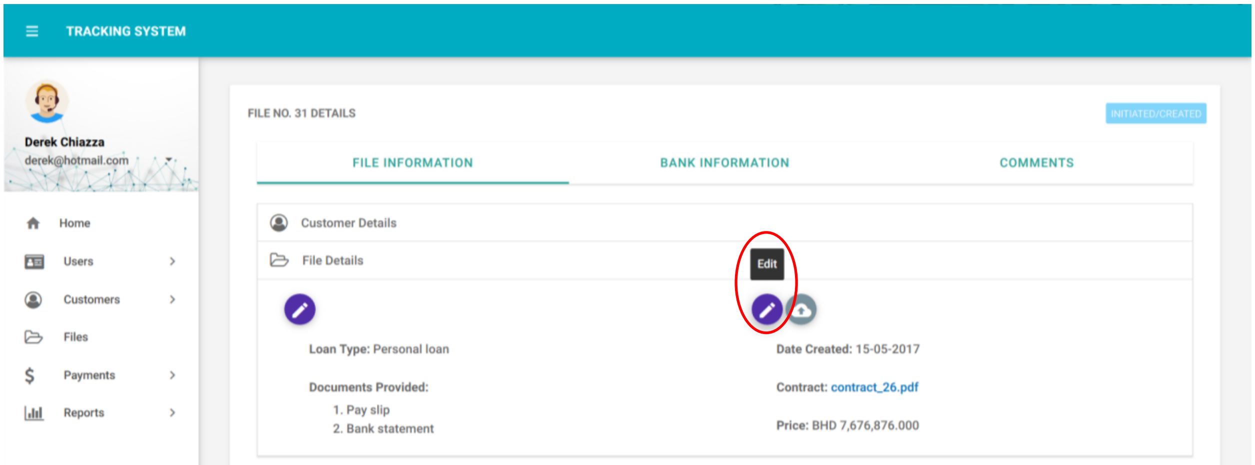

FIGURE 37 - VIEW FILE 7

6. Enter the new amount in the pop-up window and click on "Create" button to create a new contract, as shown in Figure 38.

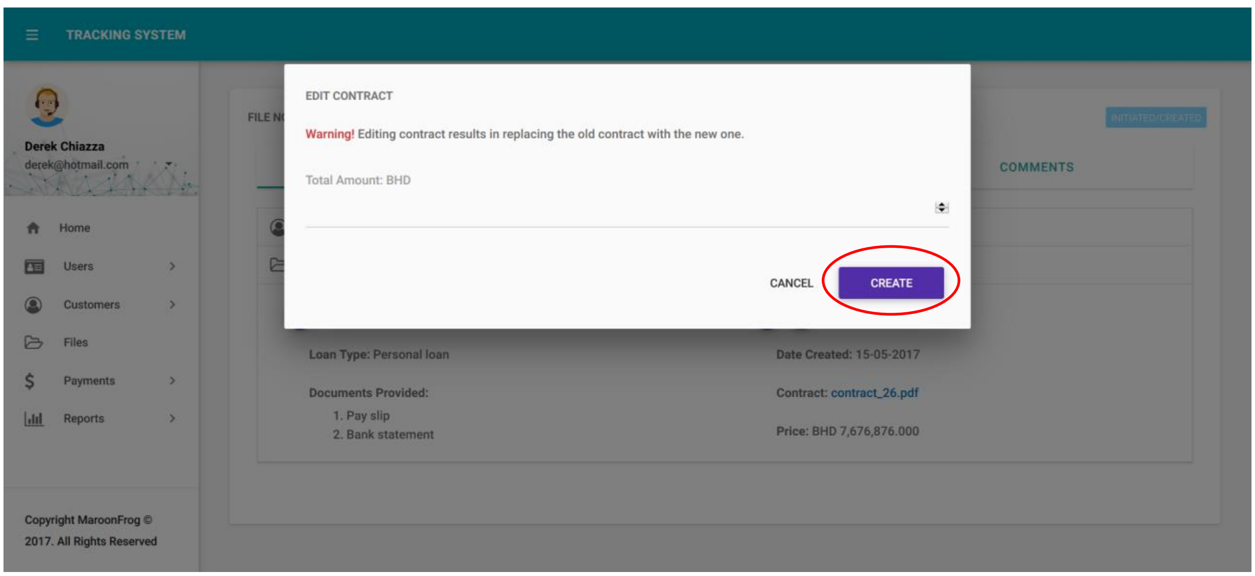

FIGURE 38 - VIEW FILE 8

7. To upload the signed contract click on the "Upload" button above the contract, as shown in Figure 39.

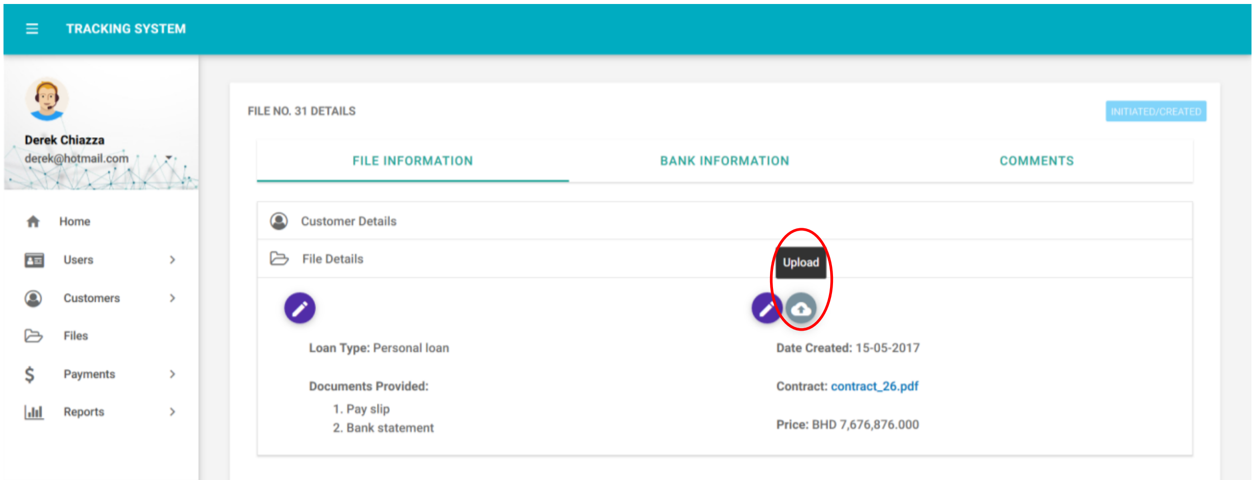

FIGURE 39 - VIEW FILE 9

8. Click on "File" in the pop-up window and select the file to be uploaded then click on "Upload" button, as shown in Figure 40. P.S – file type needs to be either PDF or doc to be uploaded.

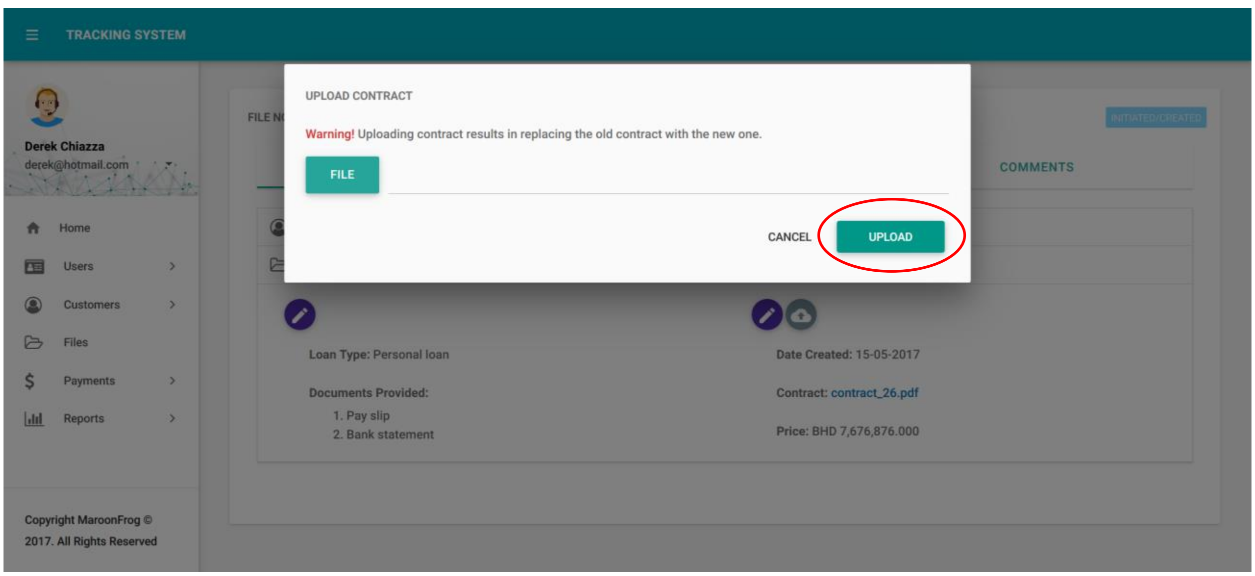

FIGURE 40 - VIEW FILE 10

- Add Bank Details

To add Bank Details click on Bank Information tab and then "Add New Bank". Fill the form with the required fields and click on the "Save" button, as shown in Figure 41.

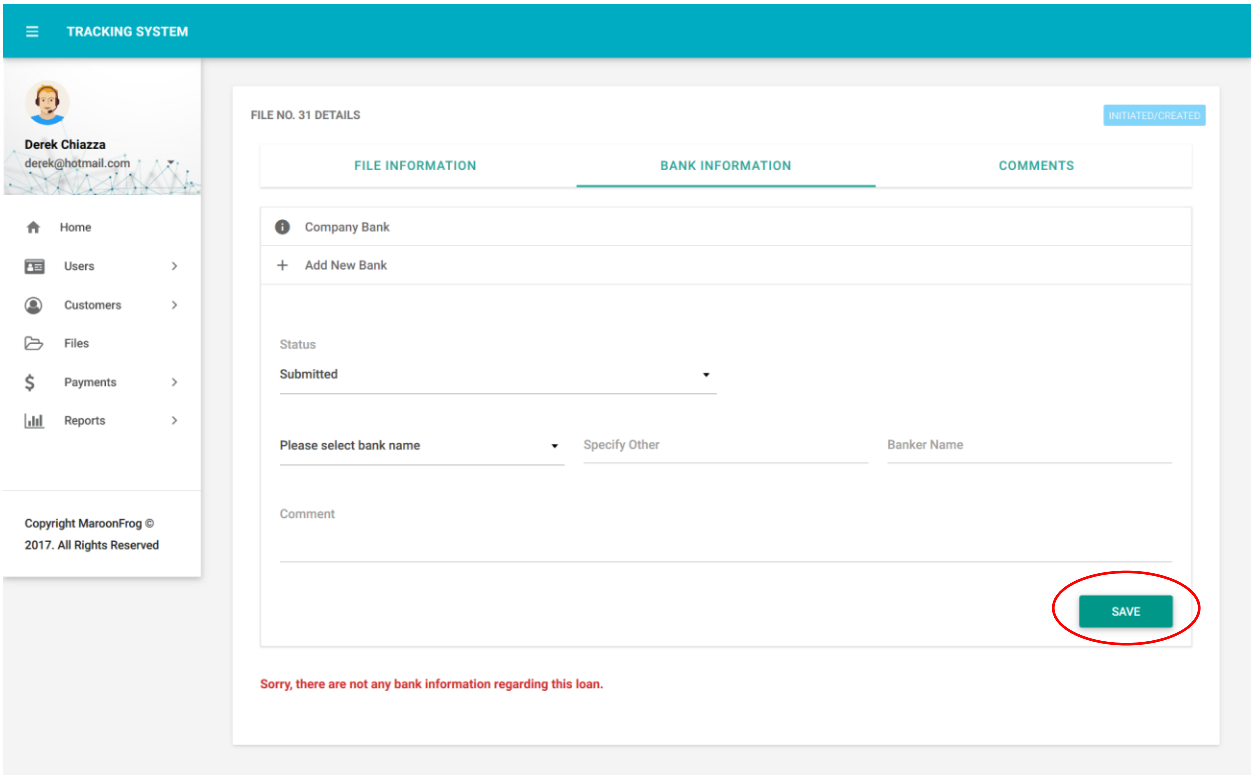

FIGURE 41 - ADD BANK DETAILS

- ## Edit Bank Details

1. Click on "Edit" button on the bank detail row, as shown in Figure 42.

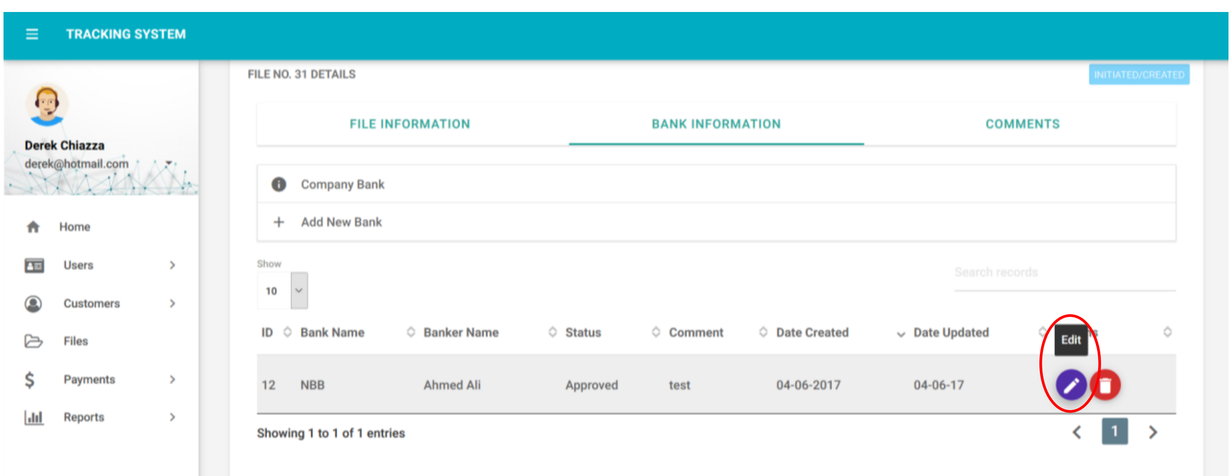

FIGURE 42 - EDIT BANK DETAILS 1

2. Edit the required fields in the pop-up window then click on “Update” button, as shown in Figure 43.

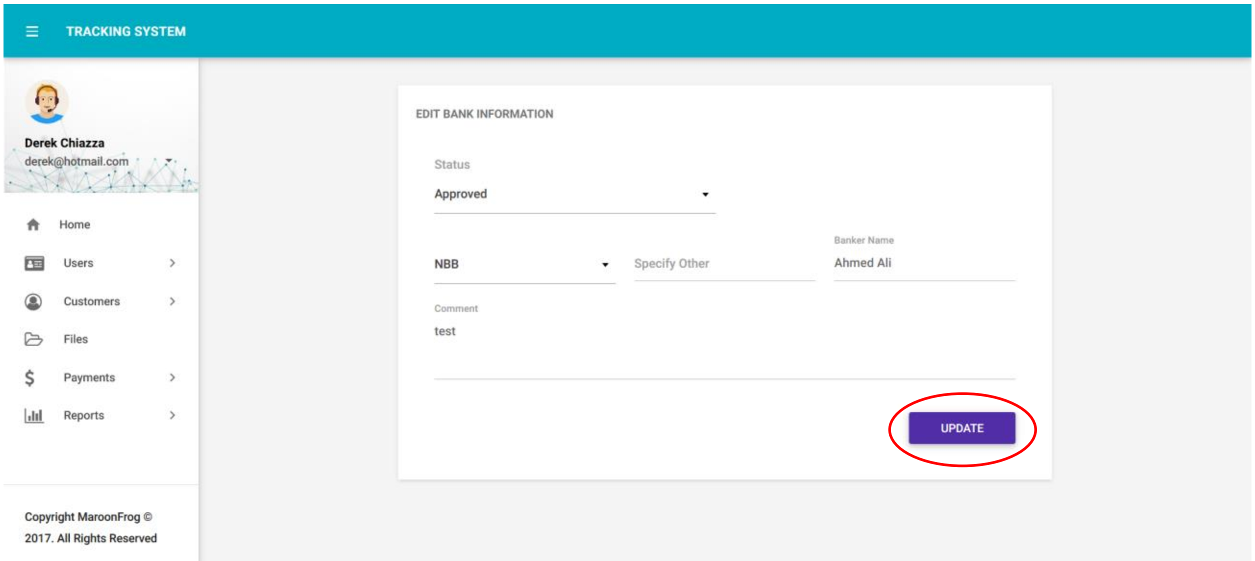

FIGURE 43 - EDIT BANK DETAILS 2

- Delete Bank Details

1. To delete bank details click on “Delete” button on the bank details row, as shown in Figure 44.

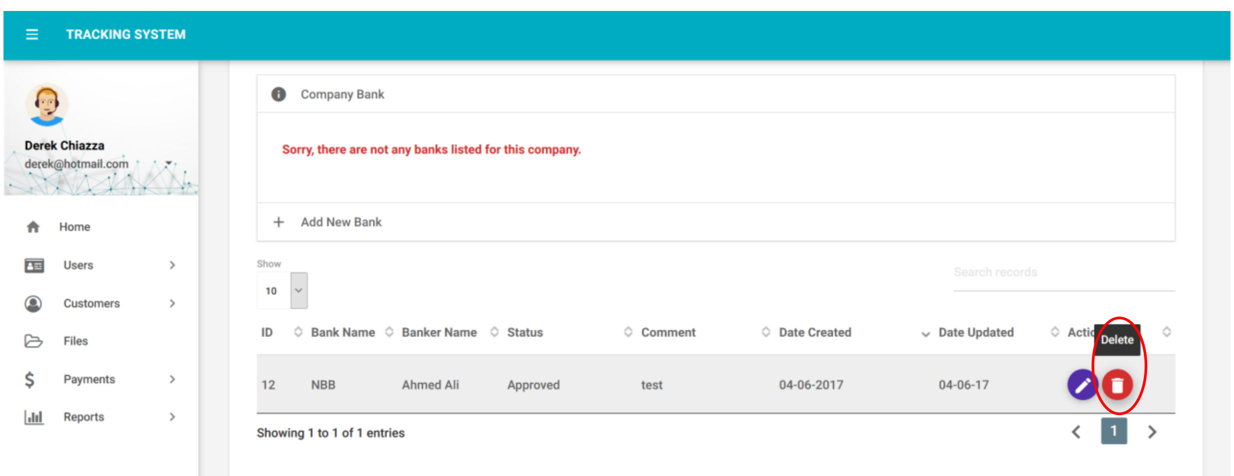

FIGURE 44 - DELETE BANK DETAILS 1

2. Click on the “Delete” button on the pop-up window, as shown in Figure 45.

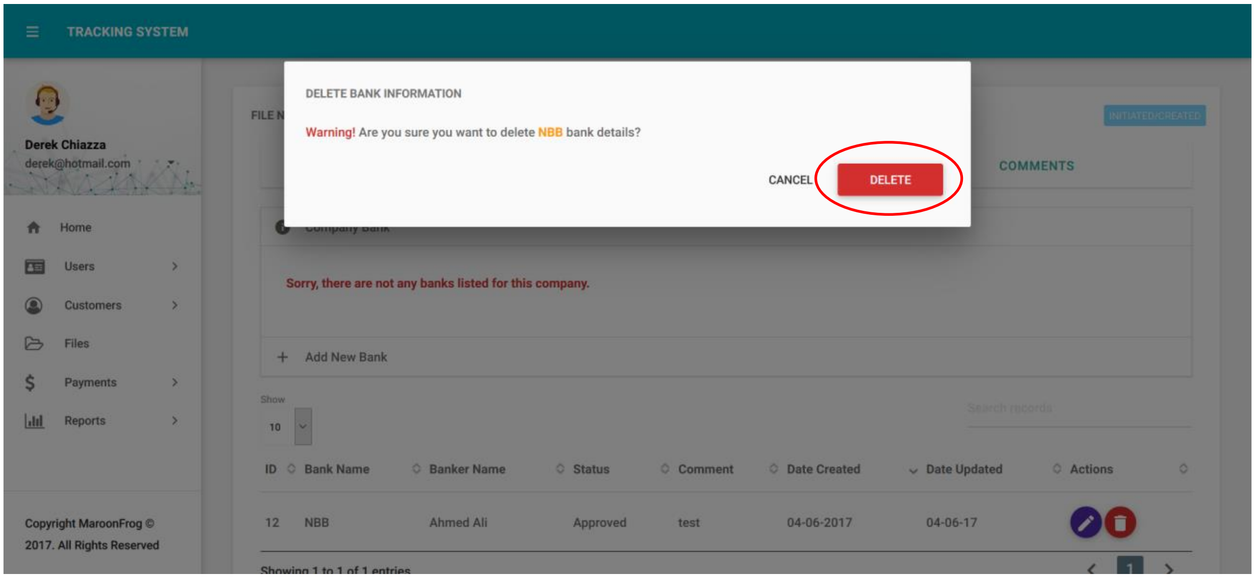

FIGURE 45 - DELETE BANK DETAILS 2

▪ Add File Comment

To add File Comment click on Comment tab and then “Add New Comment”. Fill the form with the required fields and click on the “Save” button, as shown in Figure 46.

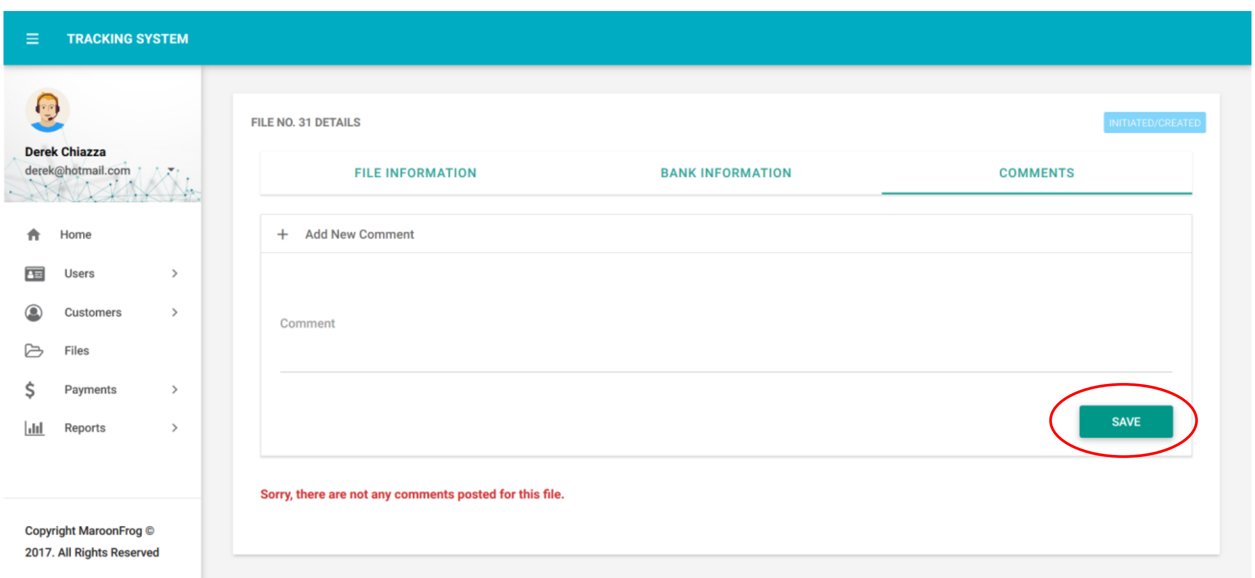

FIGURE 46 - ADD FILE COMMENT

- Edit File Comment

1. Click on “Edit” button under the comment, as shown in Figure 42.

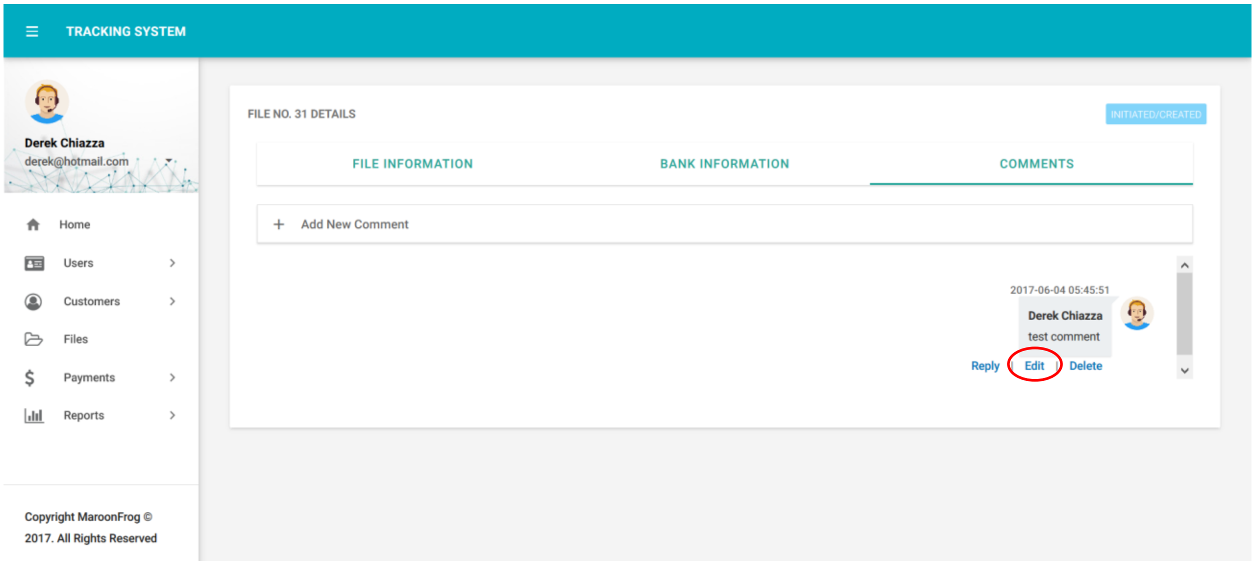

FIGURE 47 - EDIT FILE COMMENT 1

2. Edit the comment in the pop-up window then click on “Save” button, as shown in Figure 43.

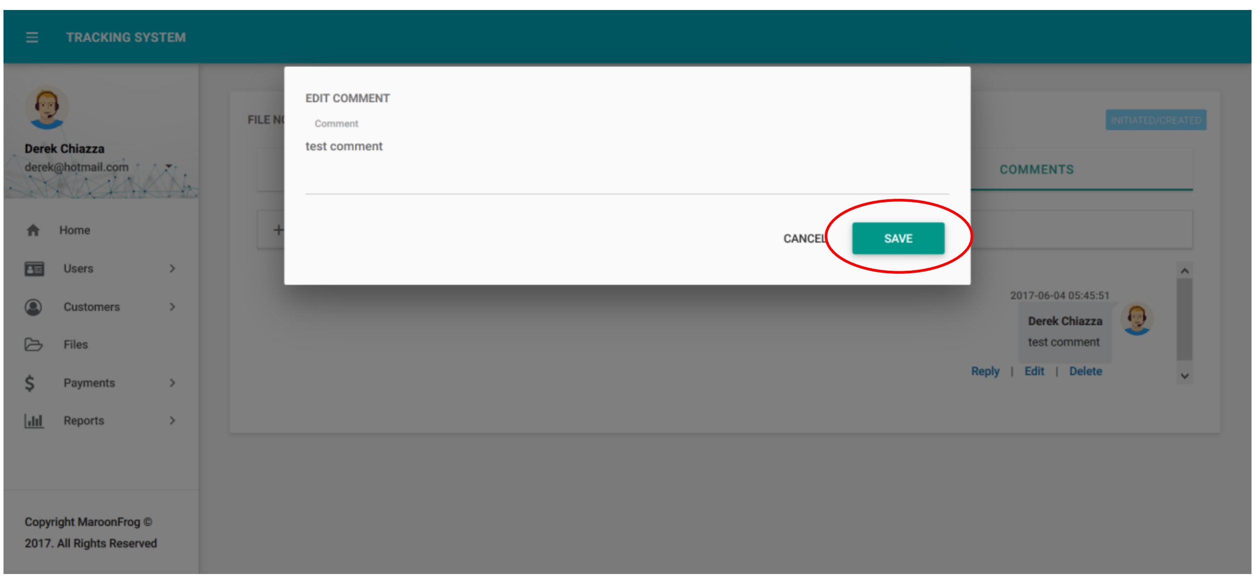

FIGURE 48 - EDIT FILE COMMENT 2

Comment on a File Comment

1. To post a comment on another File Comment click on “Reply” button under the comment, as shown in Figure 49.

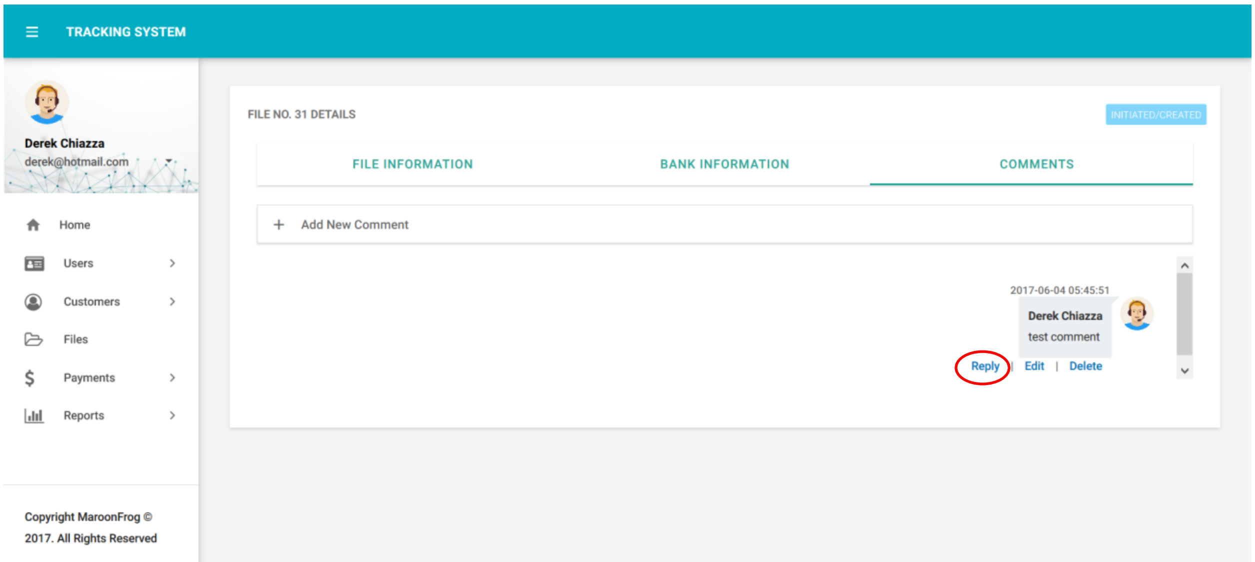

FIGURE 49 - COMMENT ON A FILE COMMENT 1

2. Fill the comment field and click on “Post” button, as shown in Figure 50.

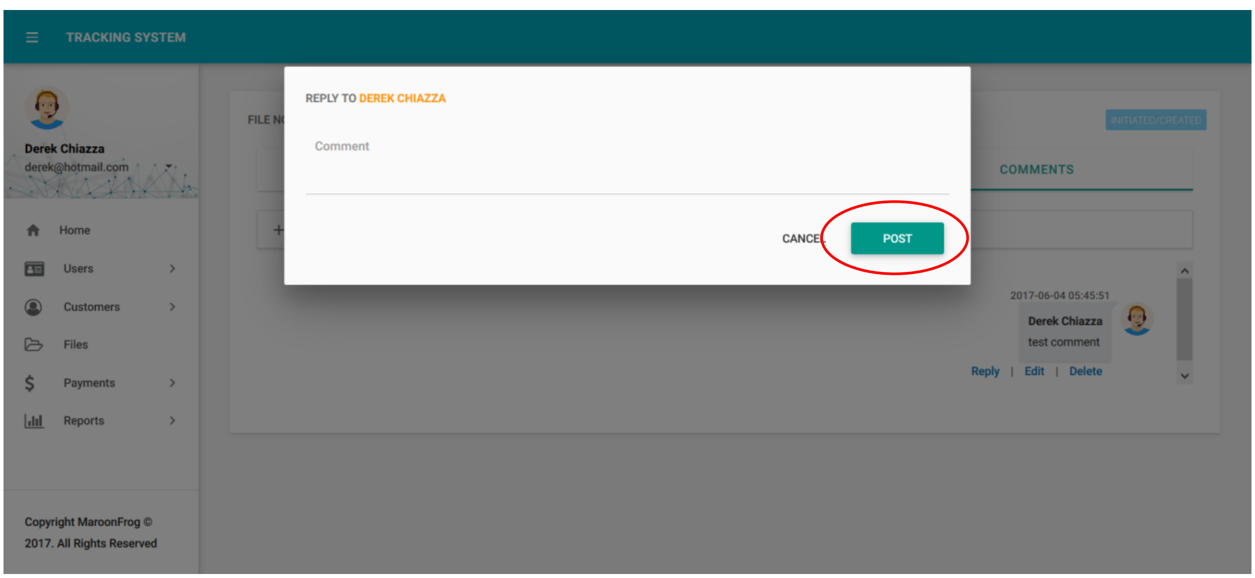

FIGURE 50 - COMMENT ON A FILE COMMENT 2

- Delete File Comment

1. To delete a comment click on the “Delete” button under the comment as shown in Figure 51.

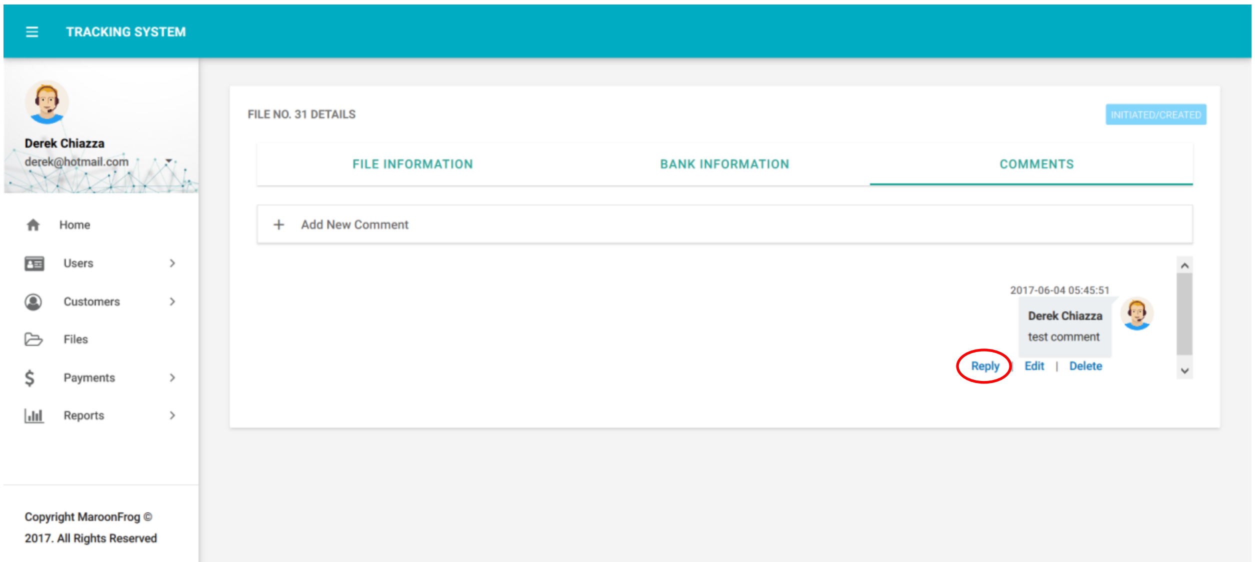

FIGURE 51 - DELETE FILE COMMENT 1

2. Click on “Delete” button on the pop-up window, as shown in Figure 52.

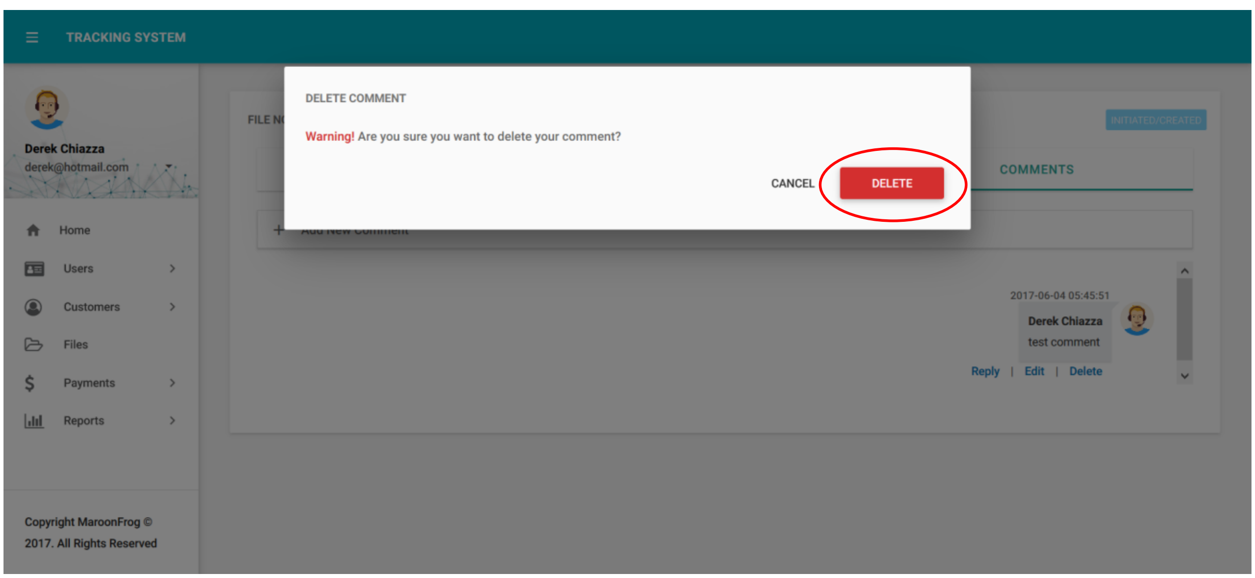

FIGURE 52 - DELETE FILE COMMENT 2

7. Payments

▪ Create Invoice

1. To create an invoice to a file, click on “Create Invoice” button on the files page, as shown in Figure 53.

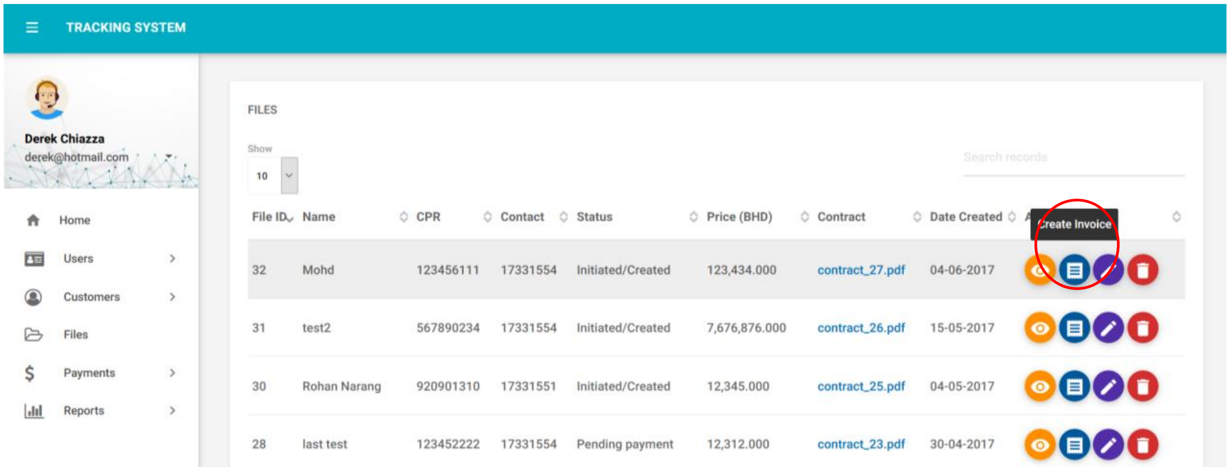

FIGURE 53 - CREATE INVOICE 1

2. Fill the required fields to edit the invoice. Click on “Add a Row” button to add an extra row to the invoice and on “Save” button to save the invoice and receive a PDF format to be printed, as shown in Figure 54.

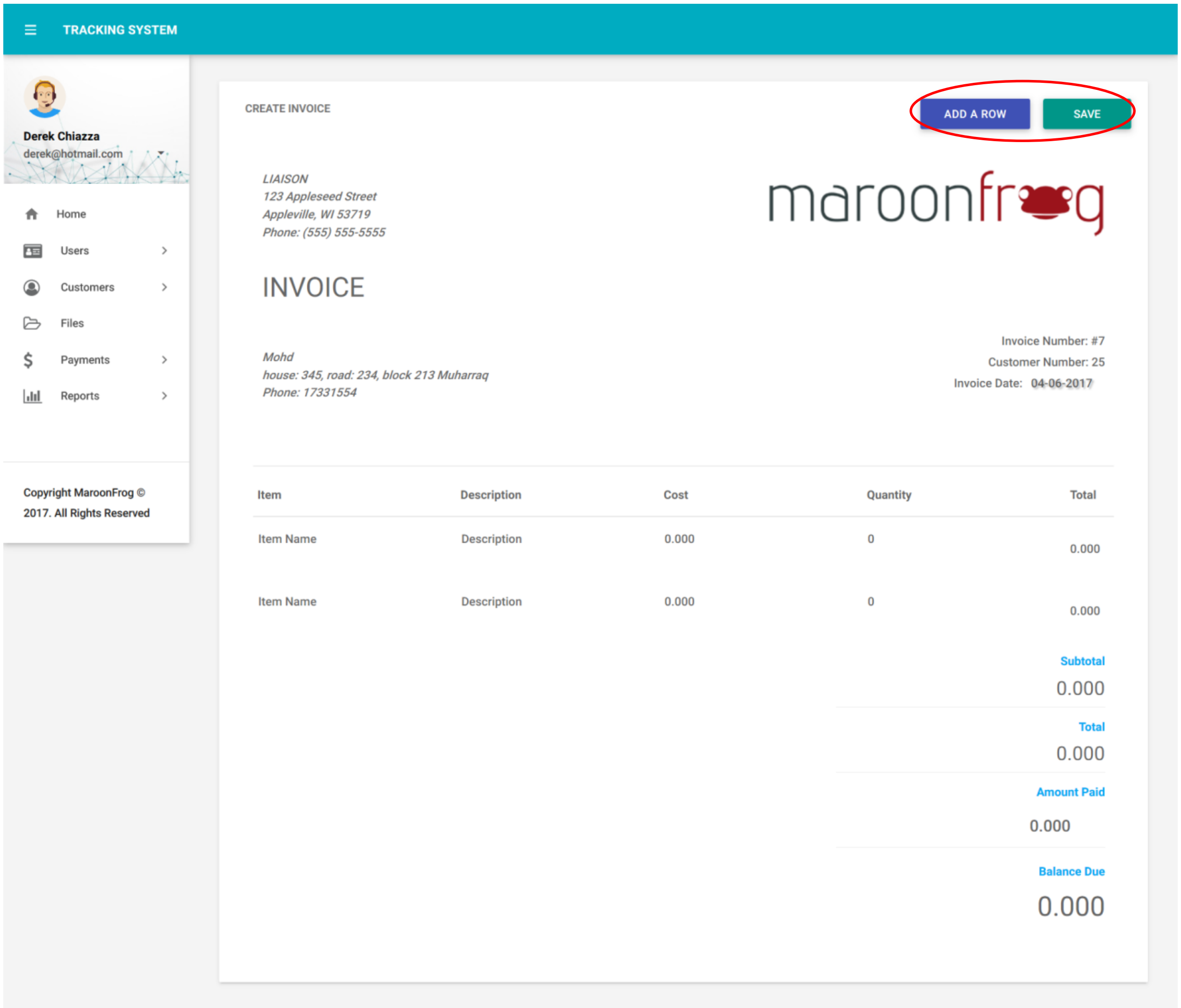

FIGURE 54 - CREATE INVOICE 2

- ## View Invoices

To view list of invoices created click on “View Invoices” on the main menu under the “Payments” heading, as shown in Figure 55.

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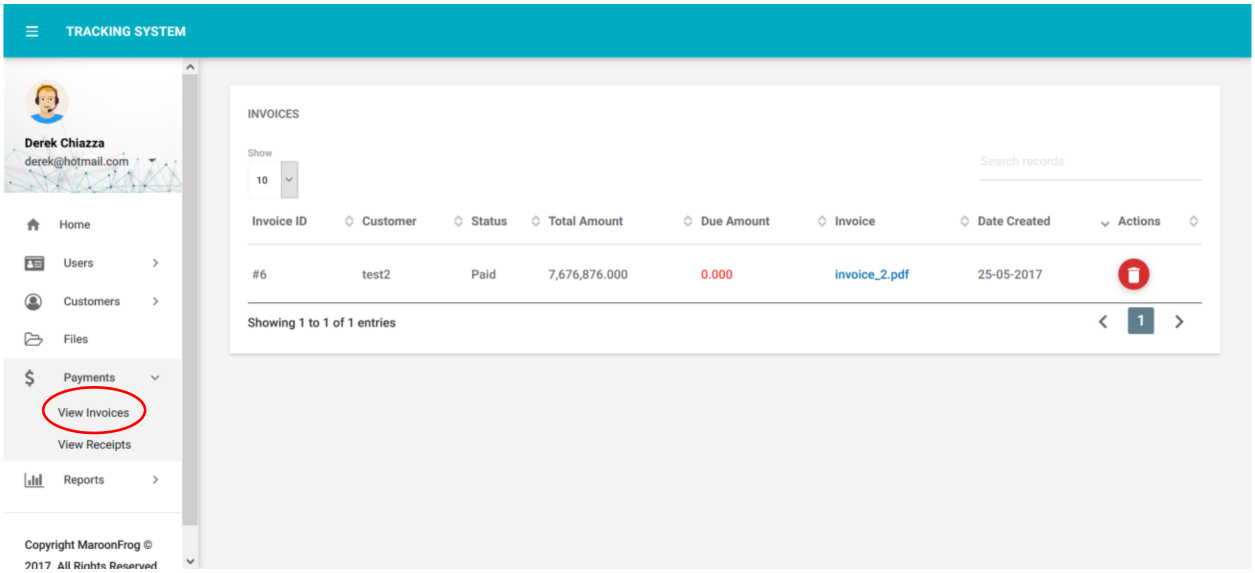

FIGURE 55 - VIEW INVOICES

- **Delete Invoice - Administrator**

1. To delete an invoice click on "Delete" button on the invoice's row, as shown in Figure 56.

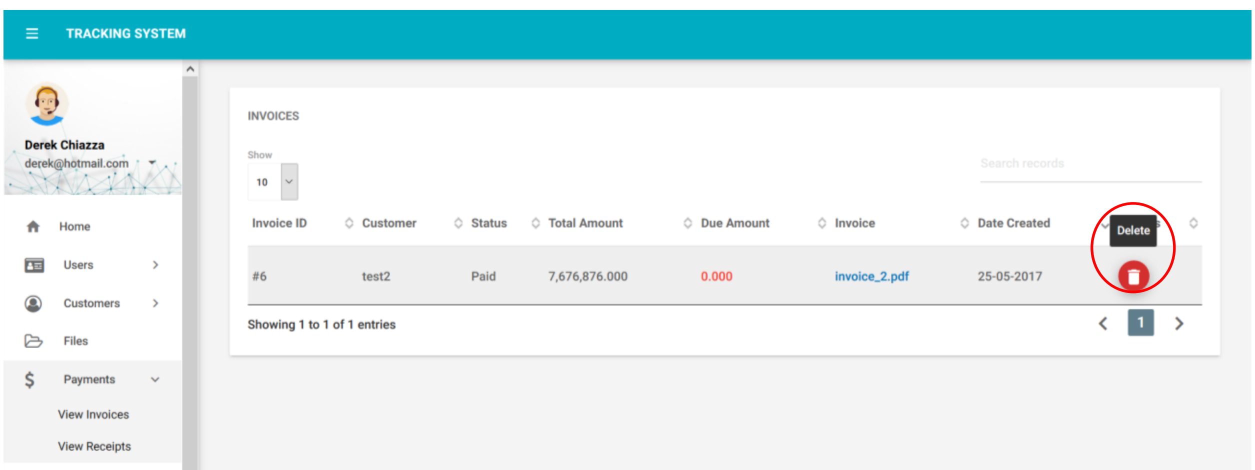

FIGURE 56 - DELETE INVOICE 1

2. Click on "Delete" button on the pop-up window, as shown in Figure 57.

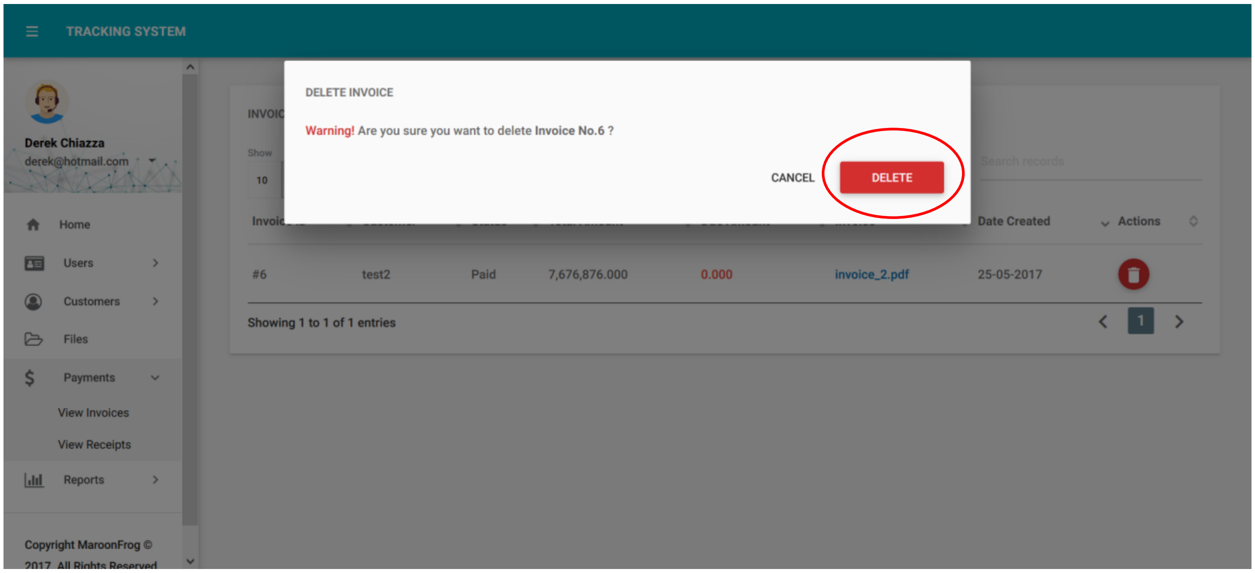

FIGURE 57 - DELETE INVOICE 2

- Create Receipt

1. If the due amount is larger than zero, you will have the ability to create a receipt for the invoice. To create it click on "Create Receipt" button on the invoice's row, as shown in Figure 58.

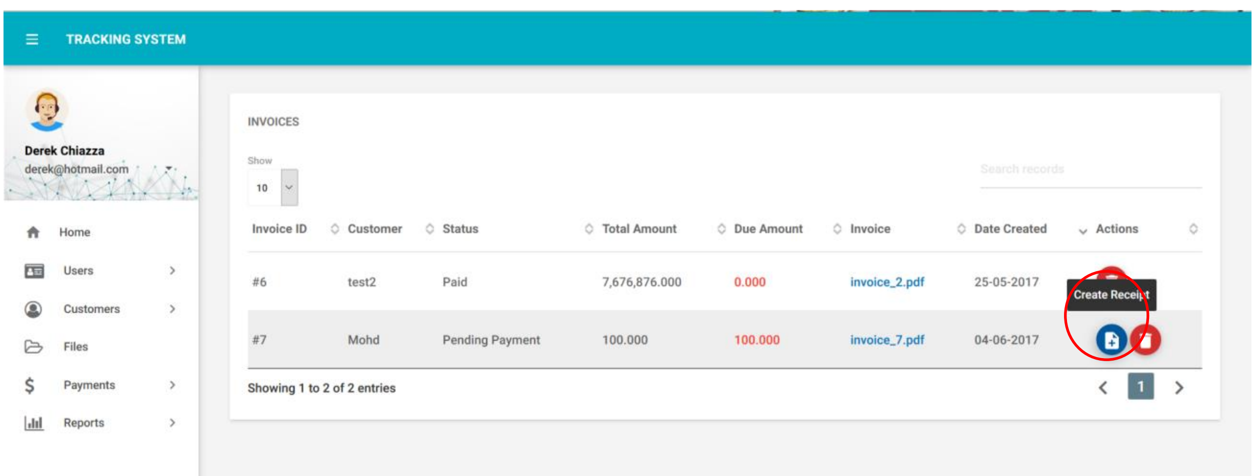

FIGURE 58 - CREATE RECEIPT 1

2. Fill out the receipt layout with the required information. Click on "Add a row" to add more rows to the receipt then "Save" button to save it and receive the receipt in PDF format to be printed as shown in Figure 59 and 60.

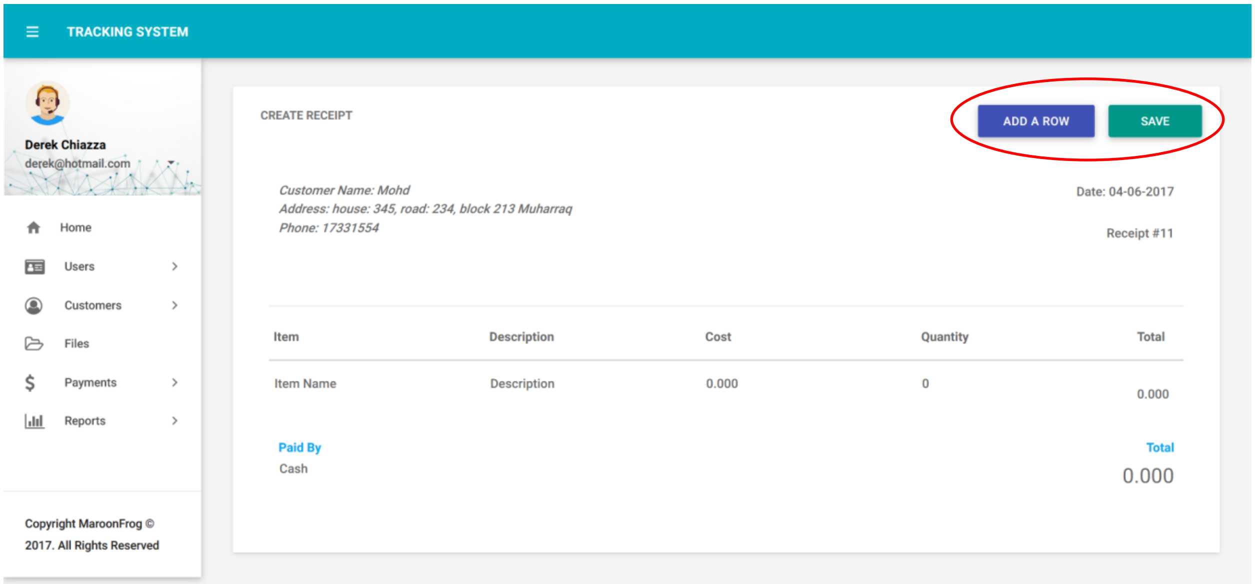

FIGURE 59 - CREATE RECEIPT 2

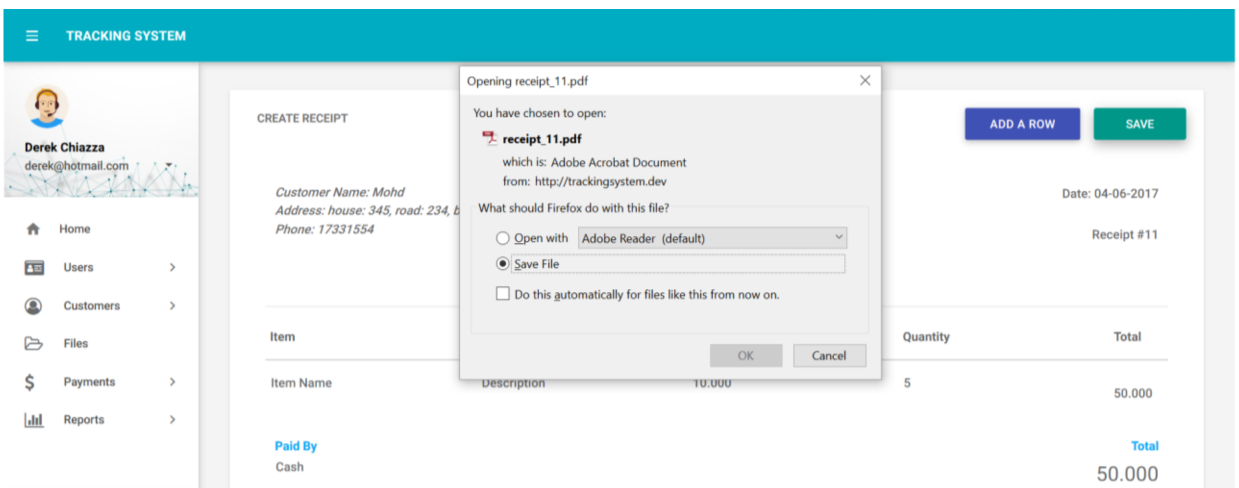

FIGURE 60 - CREATE RECEIPT 3

- View Receipts

To view list of receipts created click on “View Receipts” on the main menu under the “Payments” heading, as shown in Figure 61.

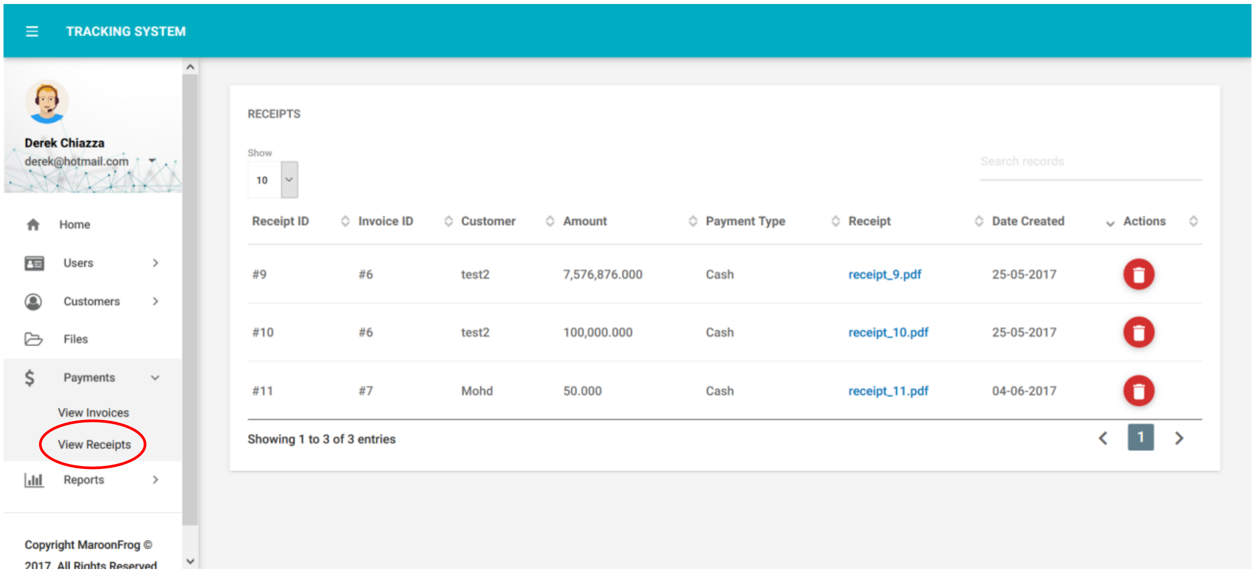

FIGURE 61 - VIEW RECEIPTS

- Delete Receipt

1. To delete a receipt click on the “Delete” button on the receipt’s row, as shown in Figure 62.

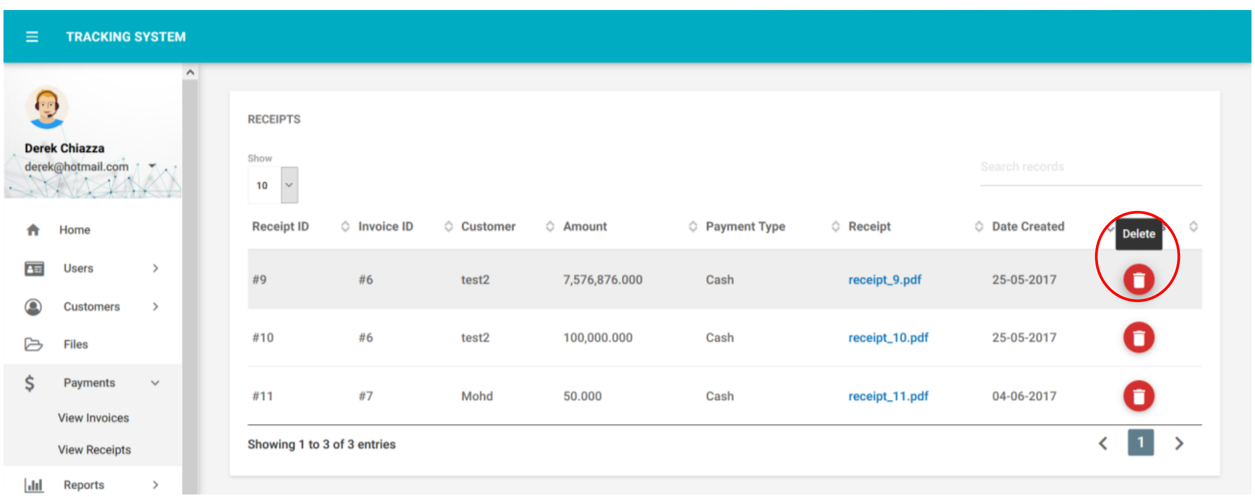

FIGURE 62 - DELETE RECEIPT 1

2. Click on “Delete” button on the pop-up window, as shown in Figure 63. P.S – Deleting a receipt will add the amount back into the due amount of the invoice.

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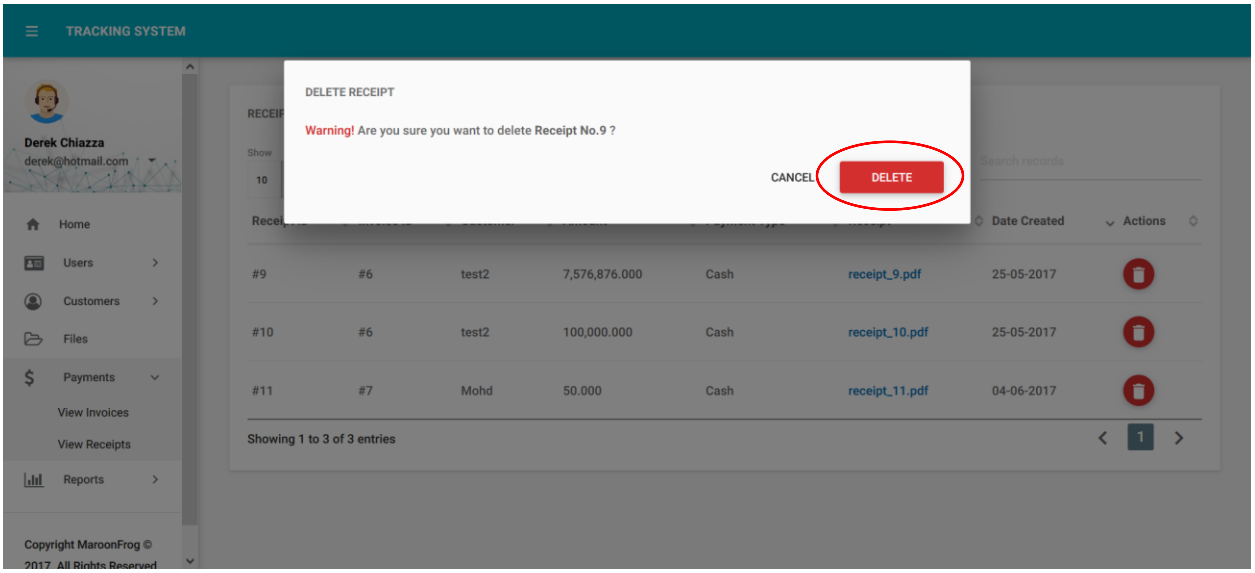

FIGURE 63 - DELETE RECEIPT 2

8. Reports – Administrator

▪ Call Center Report

To view the total amount of customers created by call center employees press on "Call Center Report" on the main menu under "Reports" heading, as shown in Figure 64.

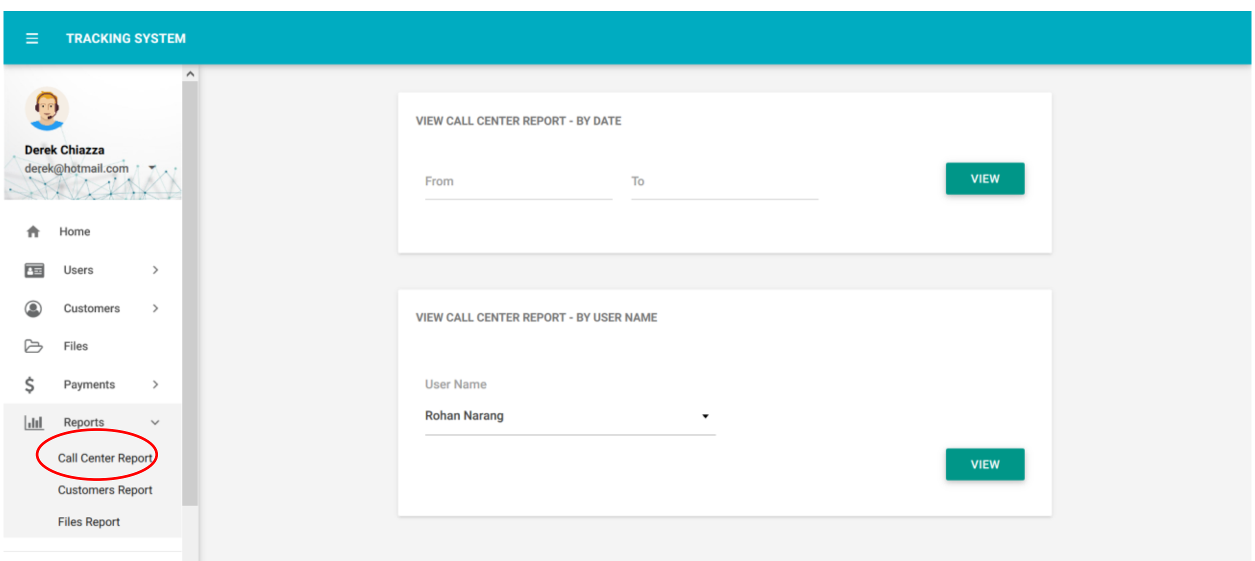

FIGURE 64 - CALL CENTER REPORT 1

1. View Report by date

To view report by date, select the To and From date then click on “View” button as shown in Figure 65. A list will appear showing the user name and total customers created, as shown in Figure 66.

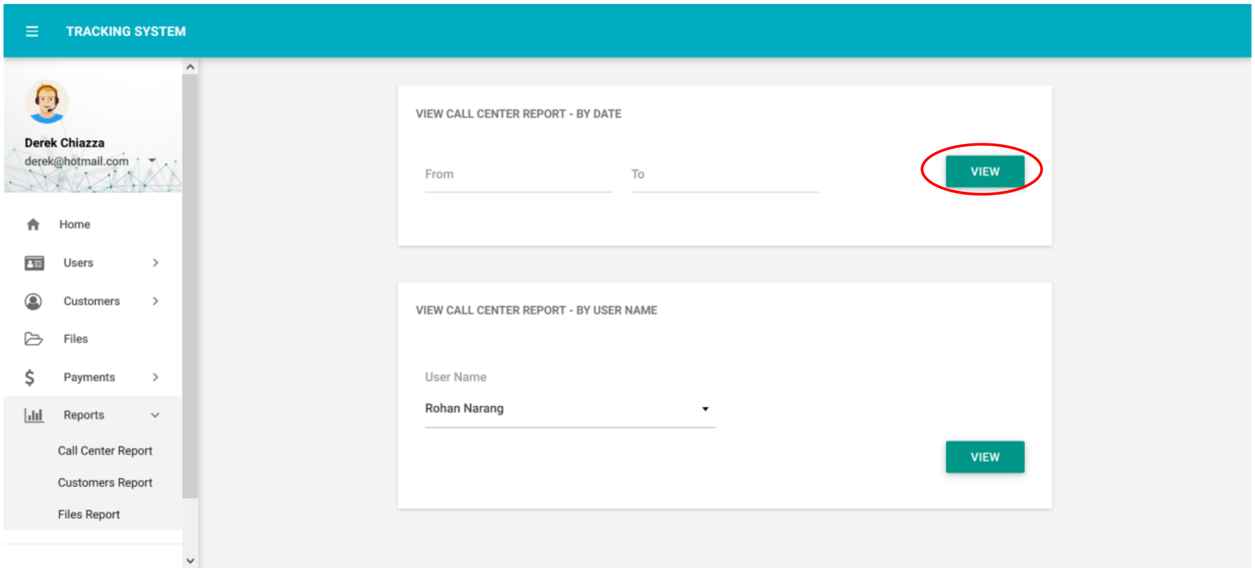

FIGURE 65 - CALL CENTER REPORT - VIEW BY DATE 1

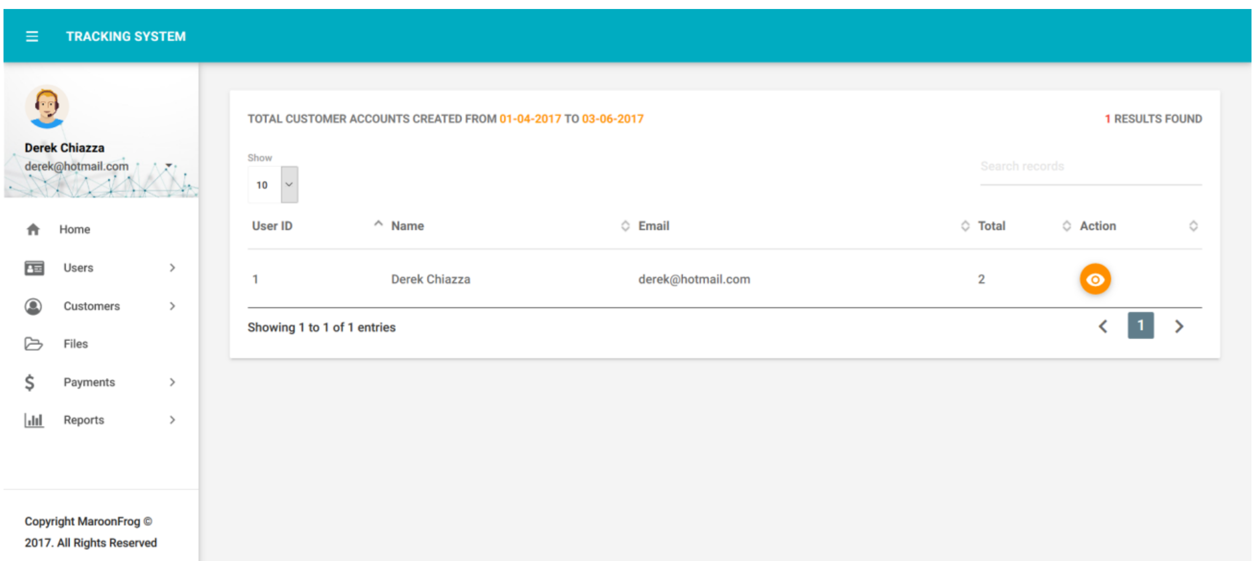

FIGURE 66 - CALL CENTER REPORT - VIEW BY DATE 2

To view the customers created click on the “View” button on the user’s row, as shown in Figure 67.

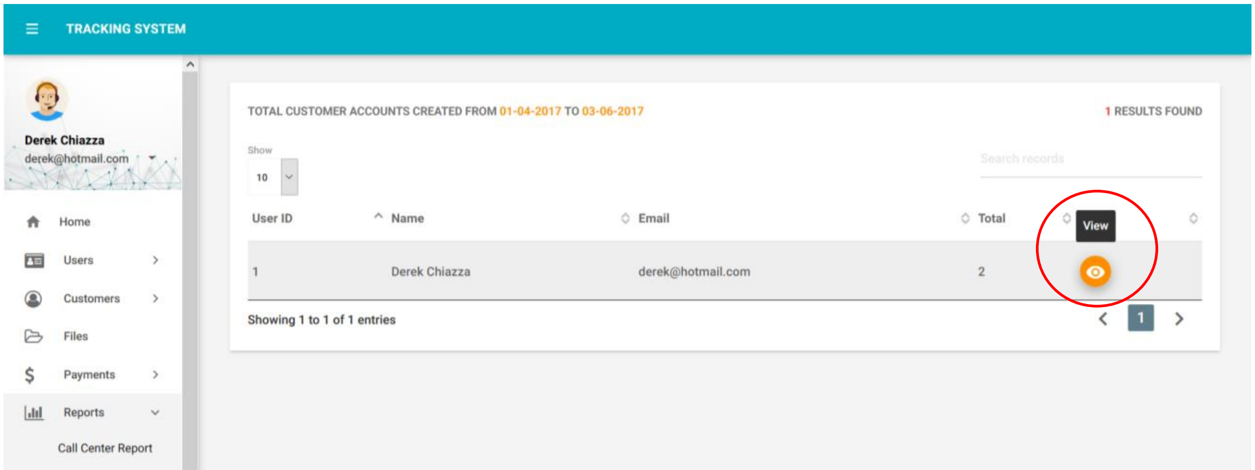

FIGURE 67 - CALL CENTER REPORT - VIEW BY DATE 3

A list will appear showing the customers created by the user, as shown in Figure 68.

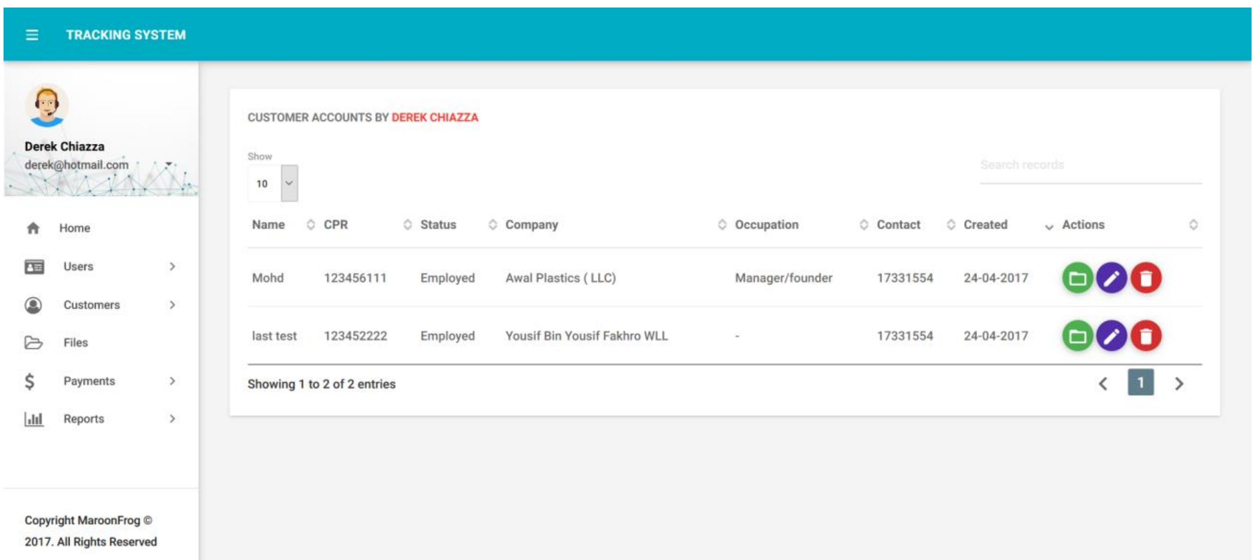

FIGURE 68 - CALL CENTER REPORT- VIEW BY DATE 4

2. View Report by User Name
   To view list of customers created by a specific user, select user name from the list and click on “View” as shown in Figure 69.

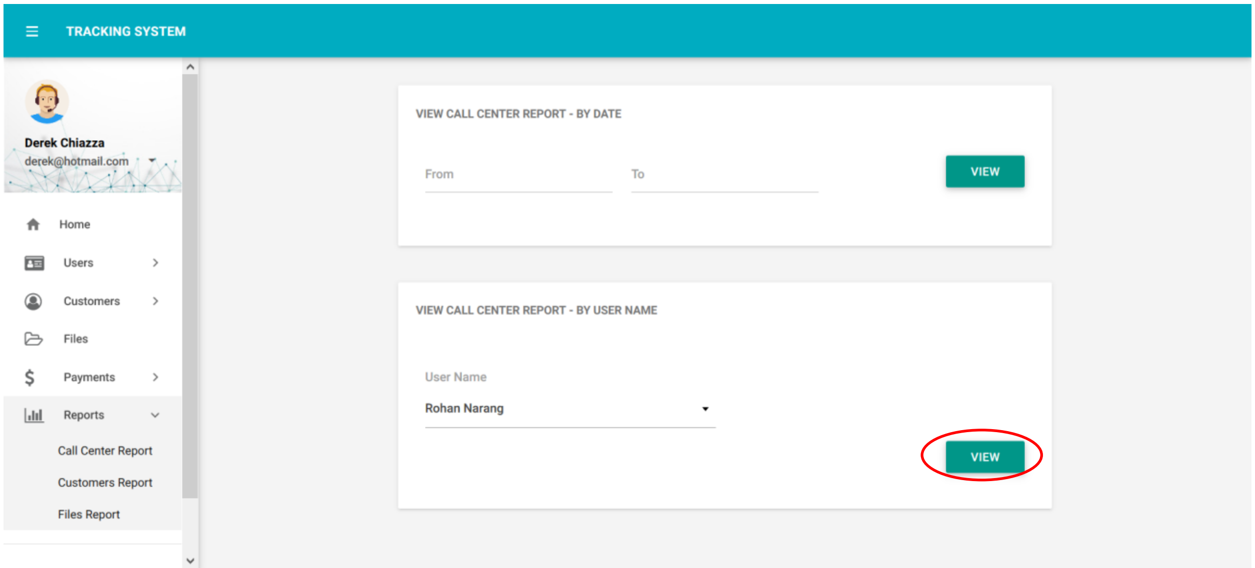

FIGURE 69 - CALL CENTER REPORT - VIEW BY NAME 1

A list will appear showing the customers created by the user, as shown in Figure 70.

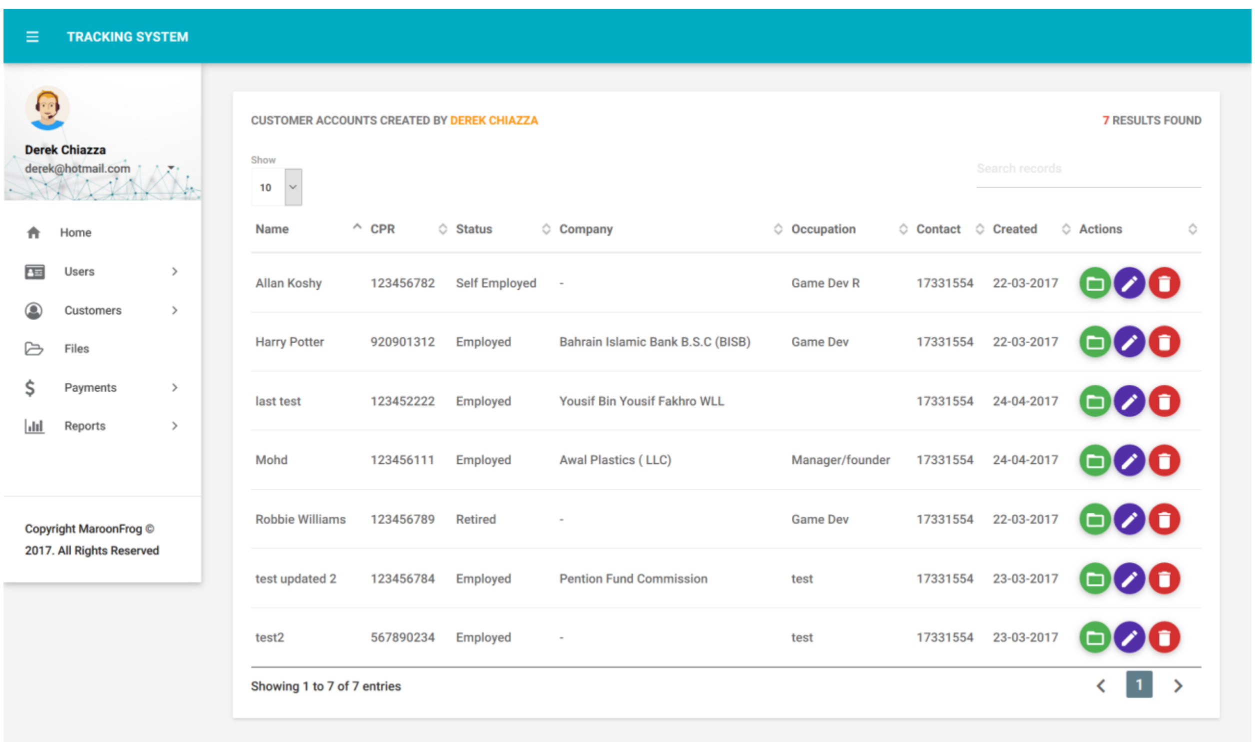

FIGURE 70 - CALL CENTER REPORT - VIEW BY NAME 2

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Customers Report

To view customers created within a selected time period click on “Customers Report” on the main menu under “Reports” heading, as shown in Figure 71.

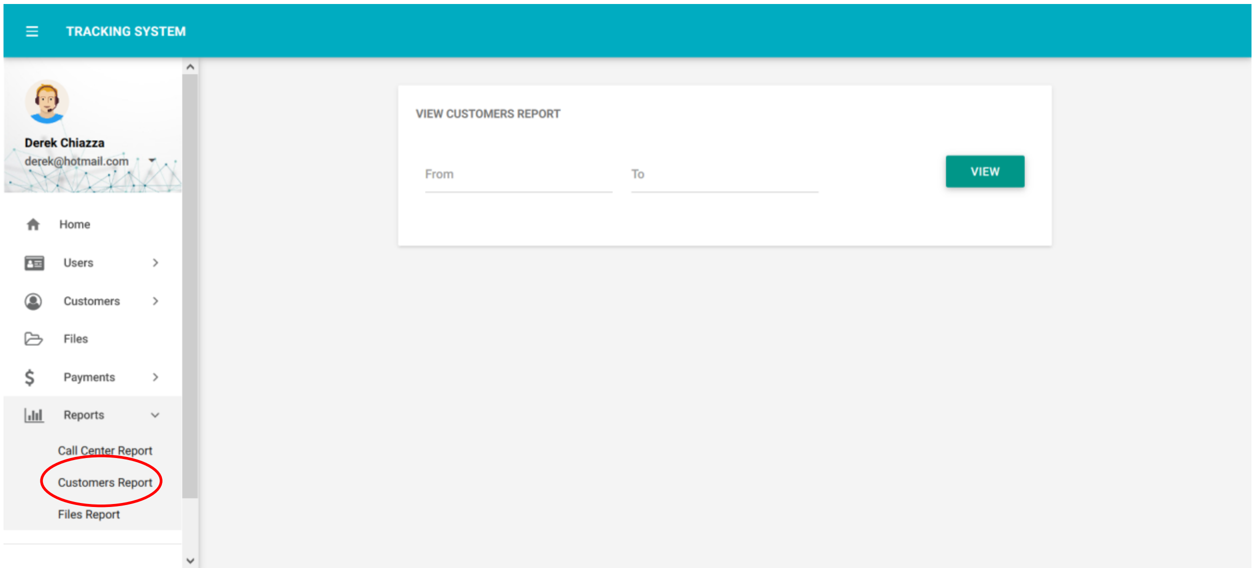

FIGURE 71 - CUSTOMER REPORT 1

Select a time period by selected the To and From dates and then clicking on “View” Button, as shown in Figure 72.

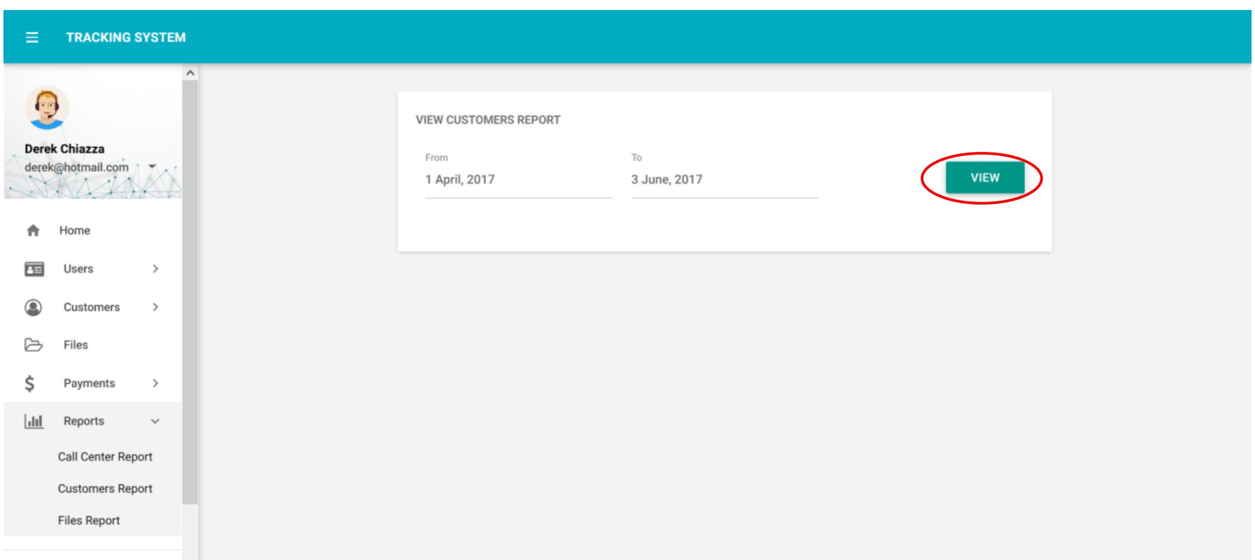

FIGURE 72 - CUSTOMER REPORT 2

A list displays showing the customer accounts created within the selected time period, as shown in Figure 73.

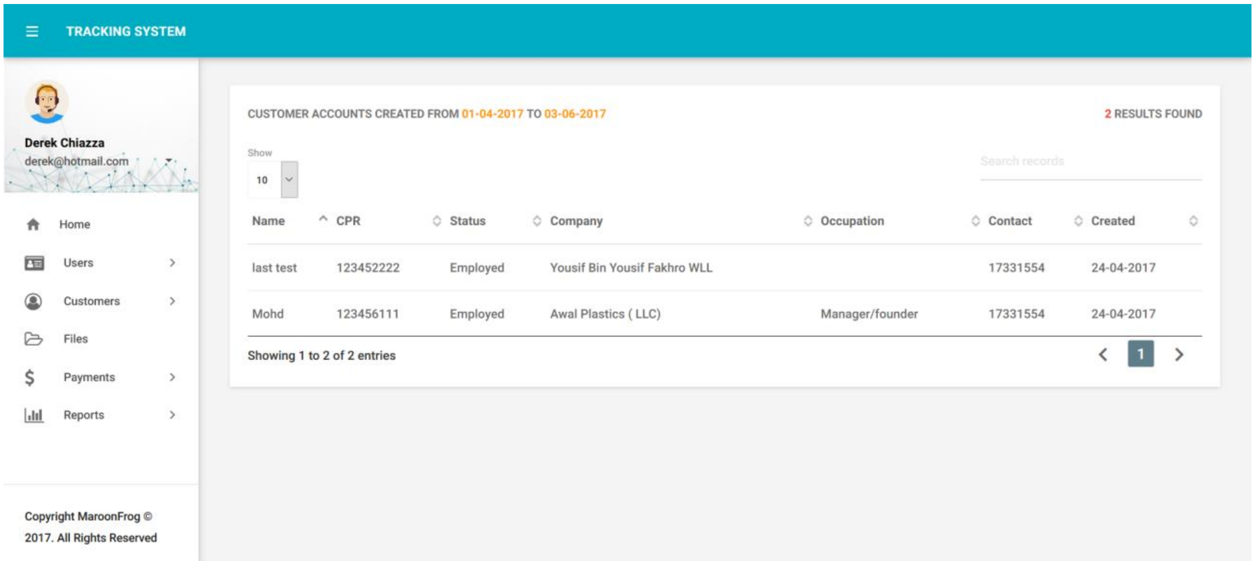

FIGURE 73 - CUSTOMER REPORT 3

- ## Files Report

To view files created within a selected time period click on "Files Report" on the main menu under "Reports" heading, as shown in Figure 74.

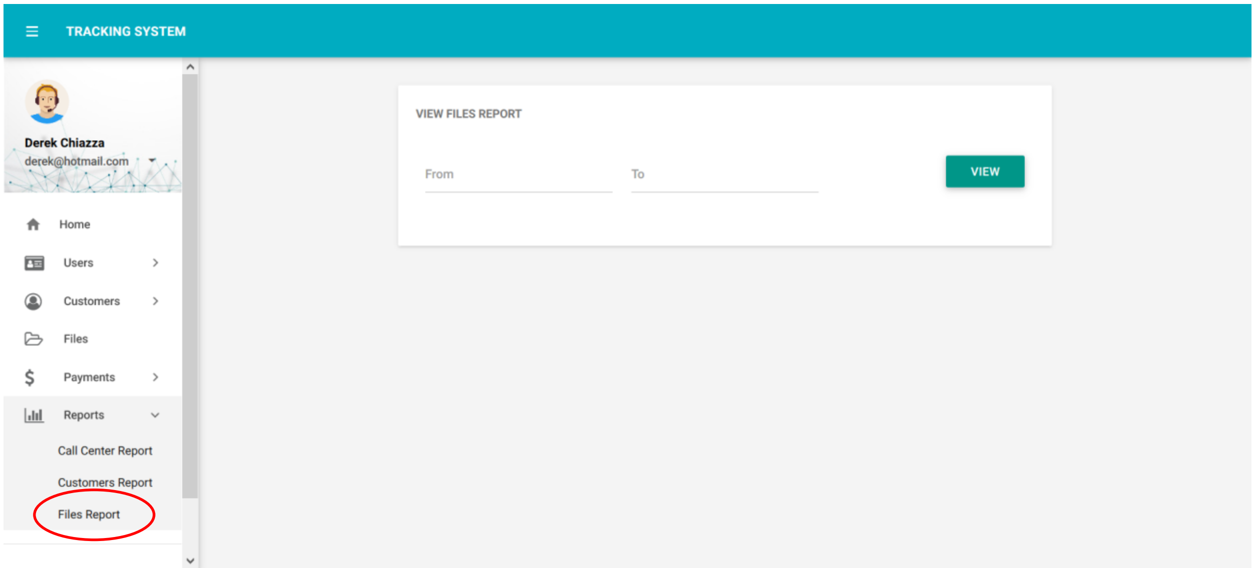

FIGURE 74 - FILES REPORT 1

Select a time period by selected the To and From dates and then clicking on "View" Button, as shown in Figure 75.

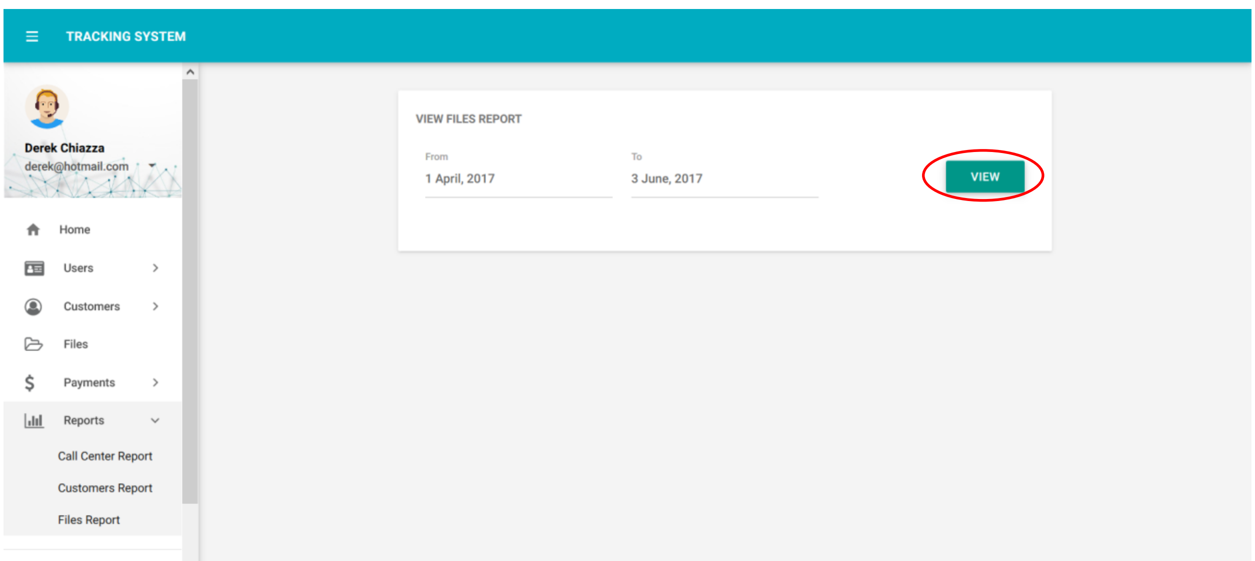

FIGURE 75 - FILES REPORT 2

A list displays showing the Files created within the selected time period, as shown in Figure 76.

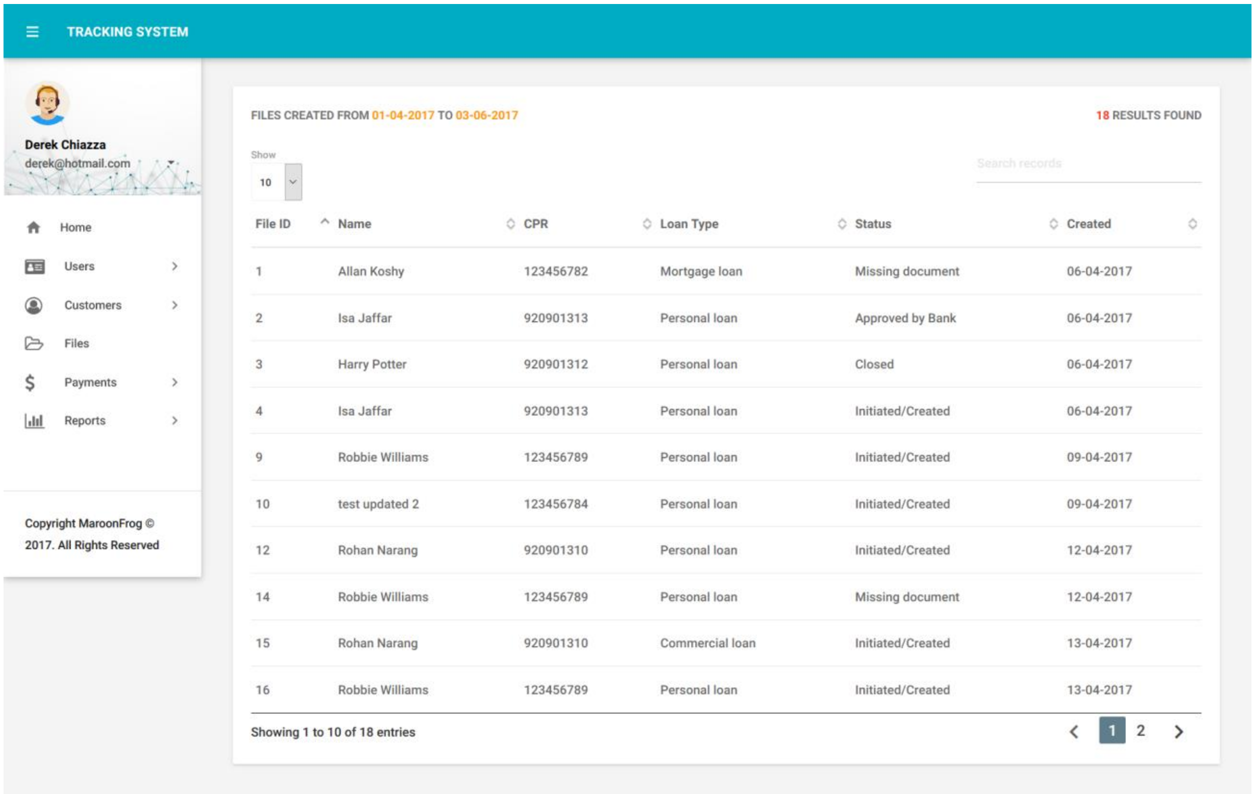

FIGURE 76 - FILES REPORT 3