



# User Manual

Client Tracking System

By

MaroonFrog

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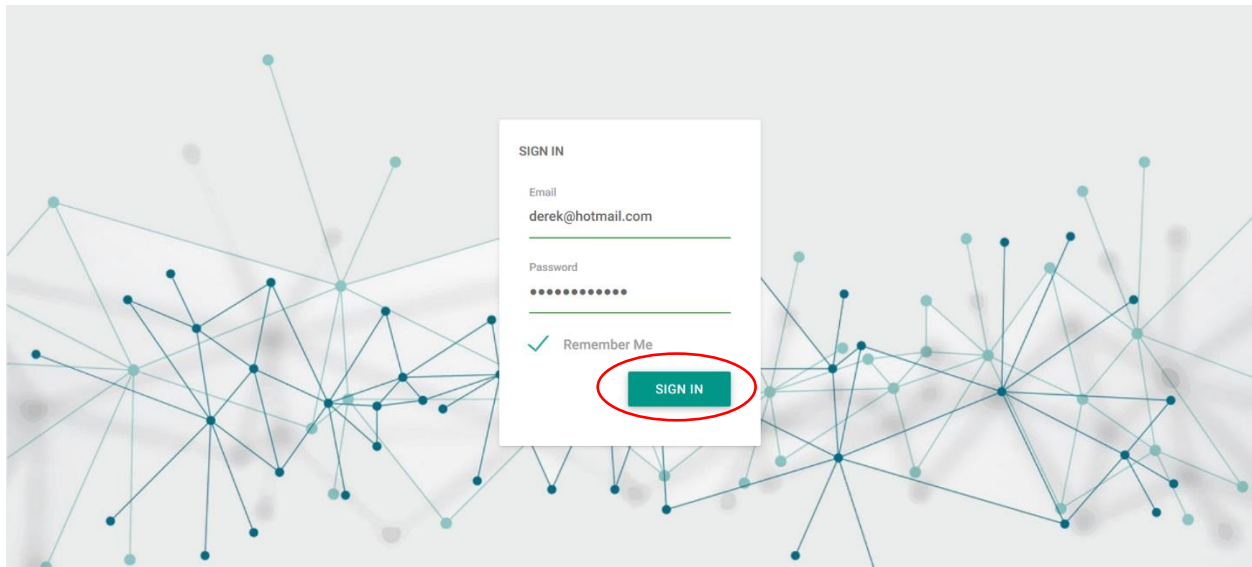
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This manual provides detailed steps to use Client Tracking System functionalities for two different types of users. The Administrator and Call Center employee.

## 1. Login

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

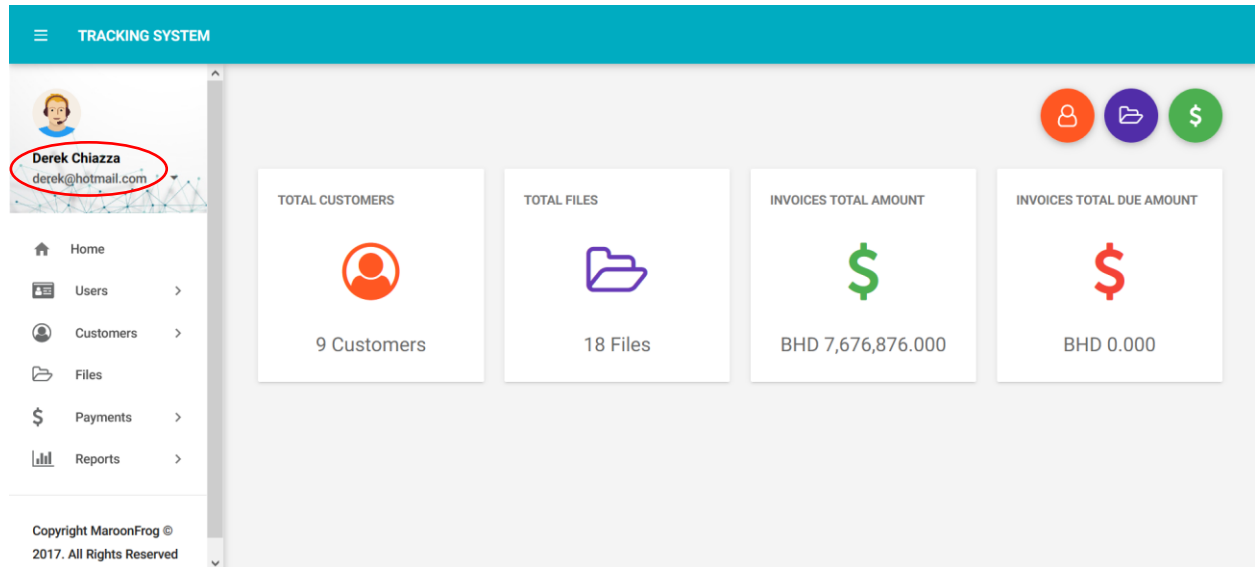


**FIGURE 1- LOGIN PAGE**

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.

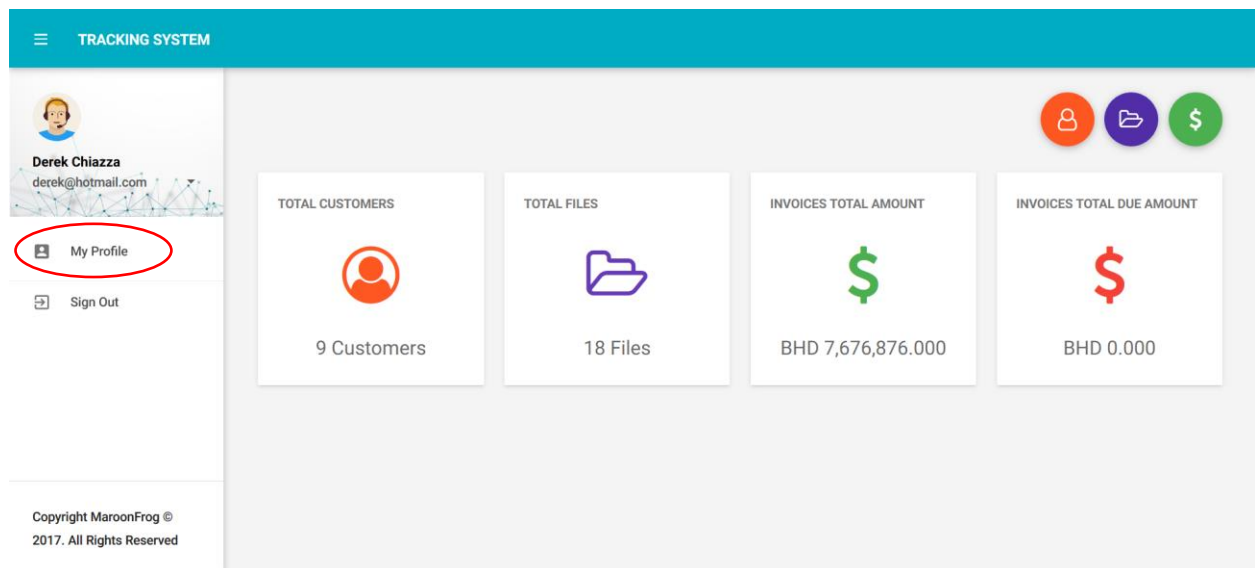
## 2. User Profile

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.

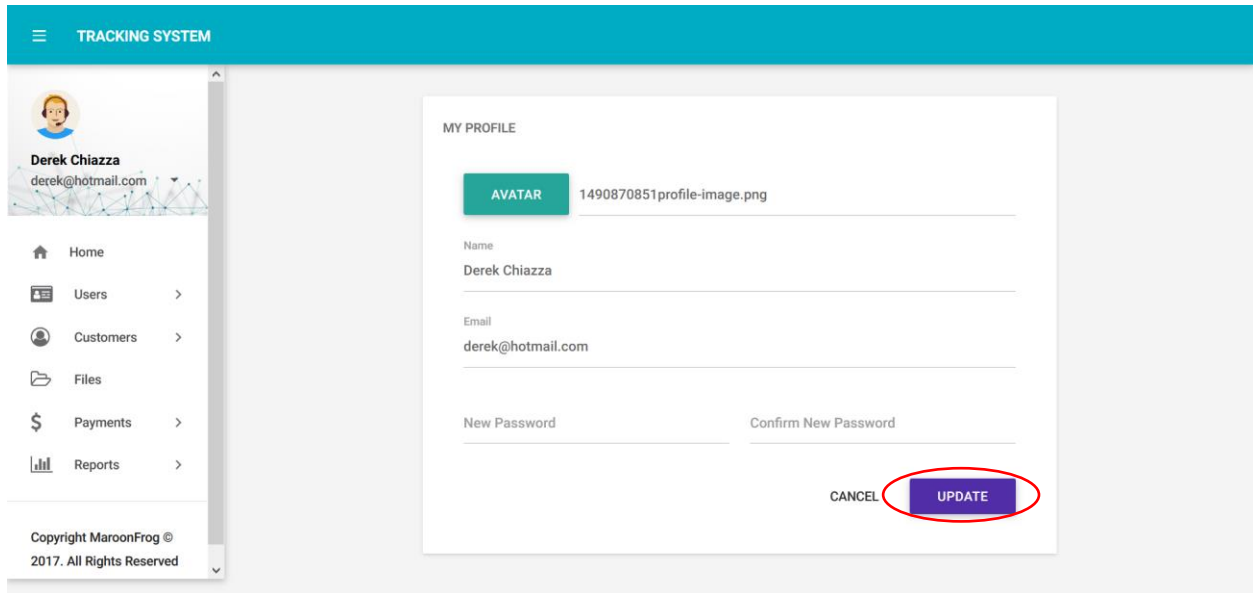


FIGURE 4 - USER PROFILE 3

### 3. Home Page

- Administrator

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

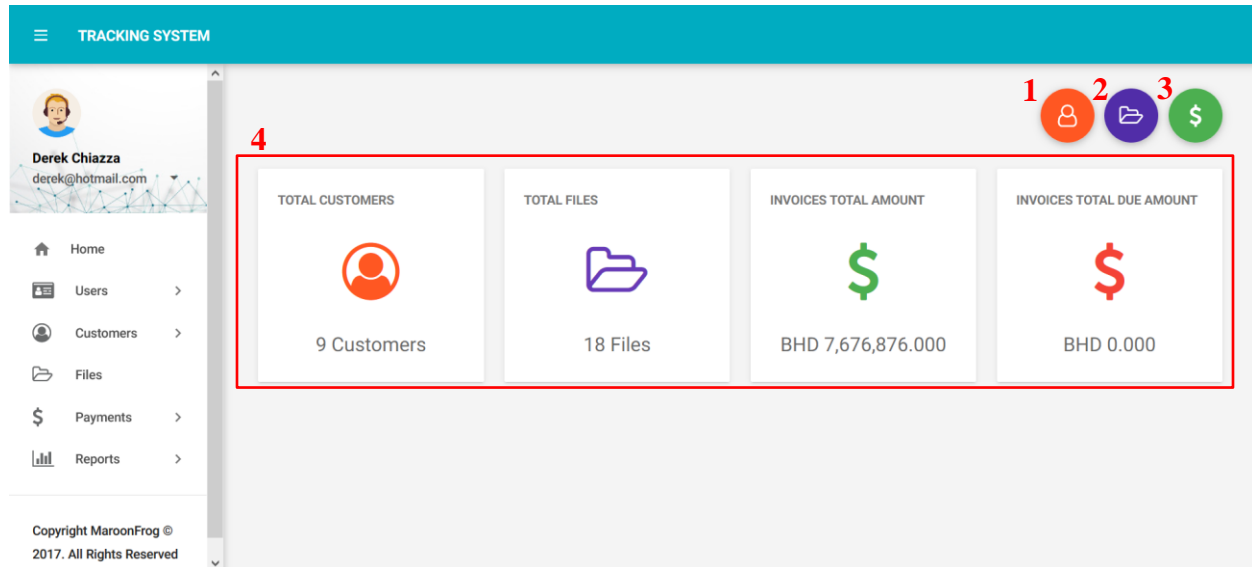


FIGURE 5 - HOME PAGE (ADMINISTRATOR)

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.

TRACKING SYSTEM

Amna Khalifa  
amna@hotmail.com

- Home
- Customers
- Files
- Payments

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1 2 3

4

### CUSTOMER ACCOUNTS

Show 10

Search records

Name	CPR	Status	Company	Occupation	Contact	Created	Actions
Mohd	123456111	Employed	Awal Plastics ( LLC)	Manager/founder	17331554	24-04-2017	
last test	123452222	Employed	Yousif Bin Yousif Fakhro WLL	-	17331554	24-04-2017	
test updated 2	123456784	Employed	Pention Fund Commission	test	17331554	23-03-2017	
test2	567890234	Employed	-	test	17331554	23-03-2017	
Rohan Narang	920901310	Self Employed	Thai Embassy	Game Dev	17331551	22-03-2017	
Isa Jaffar	920901313	Retired	-	Manager/founder	17331554	22-03-2017	
Robbie Williams	123456789	Retired	-	Game Dev	17331554	22-03-2017	
Allan Koshy	123456782	Self Employed	-	Game Dev R	17331554	22-03-2017	
Harry Potter	920901312	Employed	Bahrain Islamic Bank B.S.C (BISB)	Game Dev	17331554	22-03-2017	

Showing 1 to 9 of 9 entries

1

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.

The screenshot displays the 'TRACKING SYSTEM' interface. On the left sidebar, the 'View Users' option is highlighted with a red circle. The main content area shows a table titled 'USER ACCOUNTS' with columns for Name, Email, Role, Status, Created, Last Login, and Actions. The table lists seven users with their respective roles and statuses.

Name	Email	Role	Status	Created	Last Login	Actions
Alya Isa	alya@maroonfrog.com	ADMIN	ACTIVE	16-03-2017	1 month ago	[Edit] [Status] [Delete]
Amna Khalifa	amna@hotmail.com	CALLCENTER	ACTIVE	02-05-2017	18 seconds ago	[Edit] [Status] [Delete]
Anthony Hendra	anthony@hotmail.com	CALLCENTER	INACTIVE	16-03-2017	1 month ago	[Edit] [Status] [Delete]
Derek Chiazza	derek@hotmail.com	ADMIN	ACTIVE	15-03-2017	6 minutes ago	[Edit] [Status] [Delete]
Jack Williams	jack@hotmail.com	CALLCENTER	INACTIVE	26-03-2017	1 month ago	[Edit] [Status] [Delete]
Namra	namra@hotmail.com	CALLCENTER	ACTIVE	02-05-2017	4 weeks ago	[Edit] [Status] [Delete]
Rohan Narang	rohan@hotmail.com	CALLCENTER	ACTIVE	16-03-2017	1 month ago	[Edit] [Status] [Delete]

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.

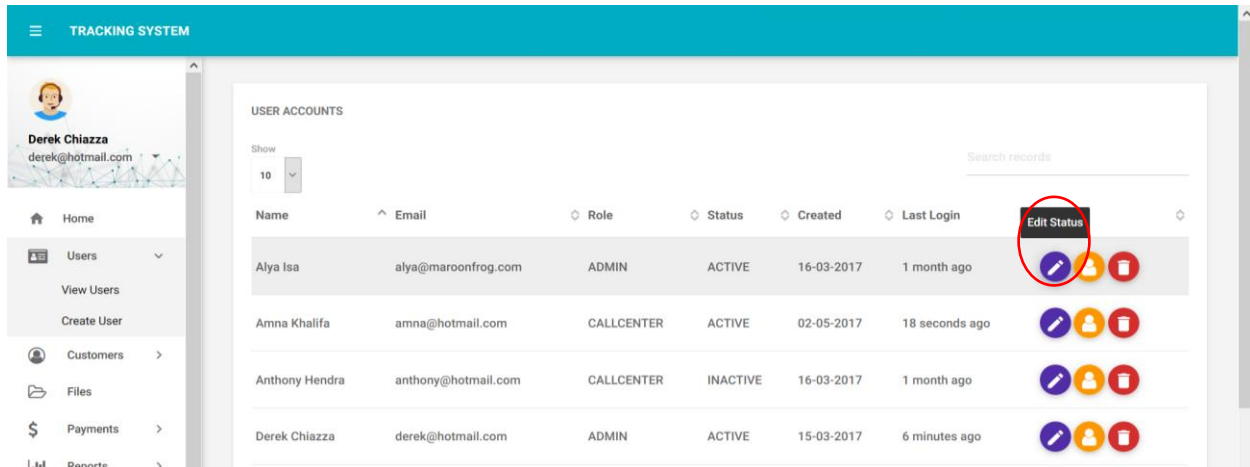


FIGURE 8 - EDIT USER 1

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.

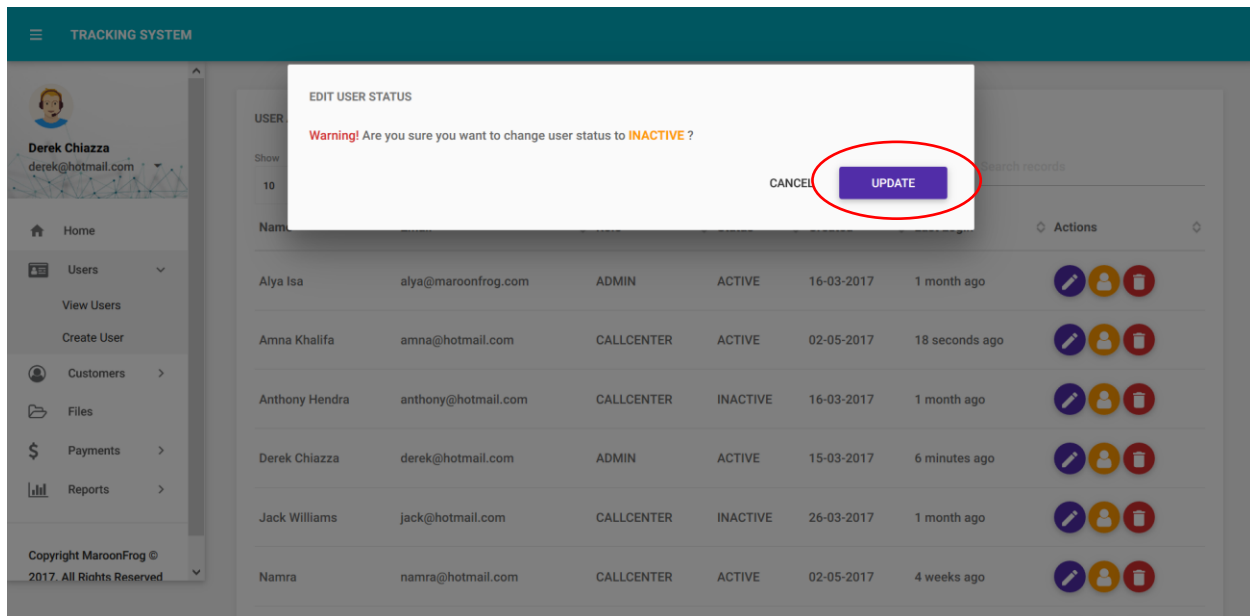


FIGURE 9 - EDIT USER 2

## ▪ Edit Role

1. To edit User Role, click on “Edit Role” button on the user’s row, as shown on Figure 10.

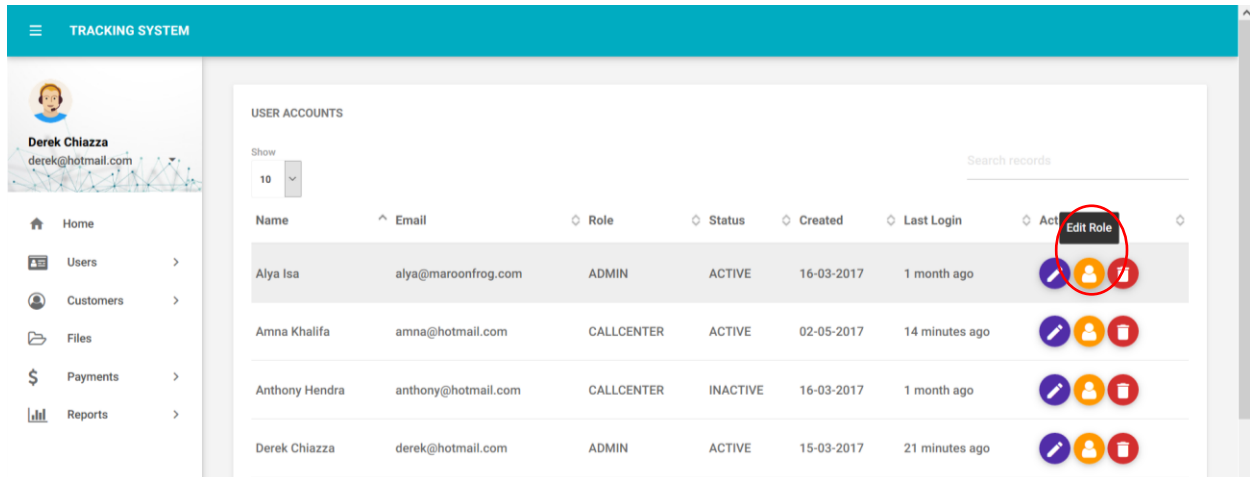


FIGURE 10 - EDIT ROLE 1

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.

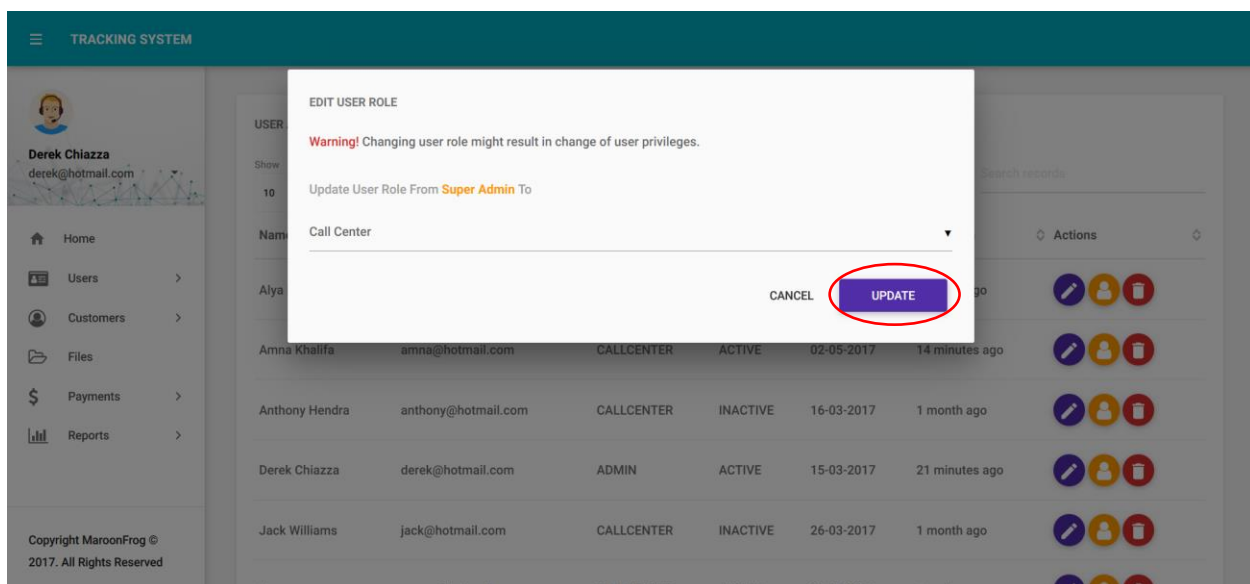
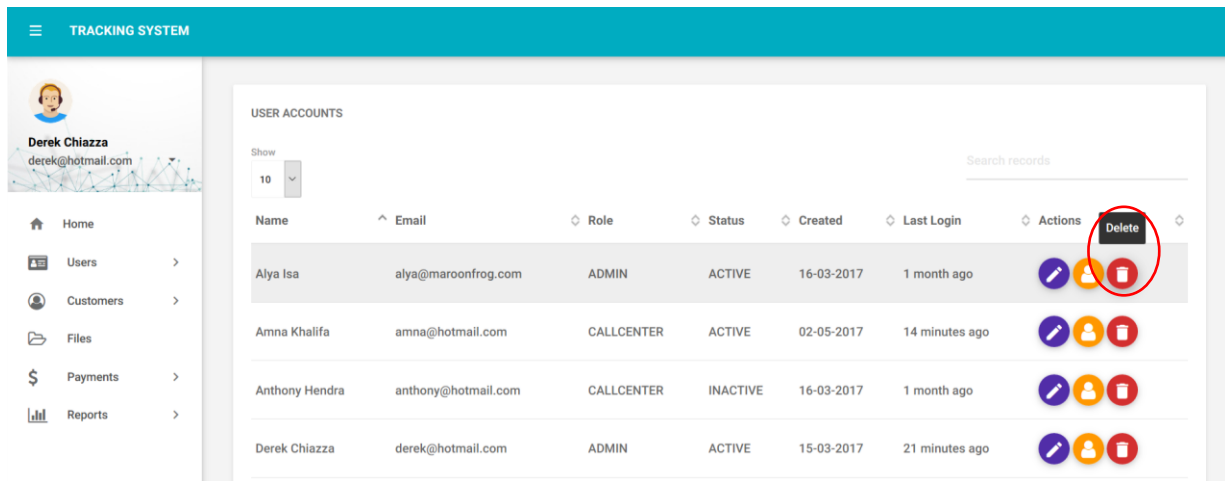


FIGURE 11 - EDIT ROLE 2

## ■ 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.

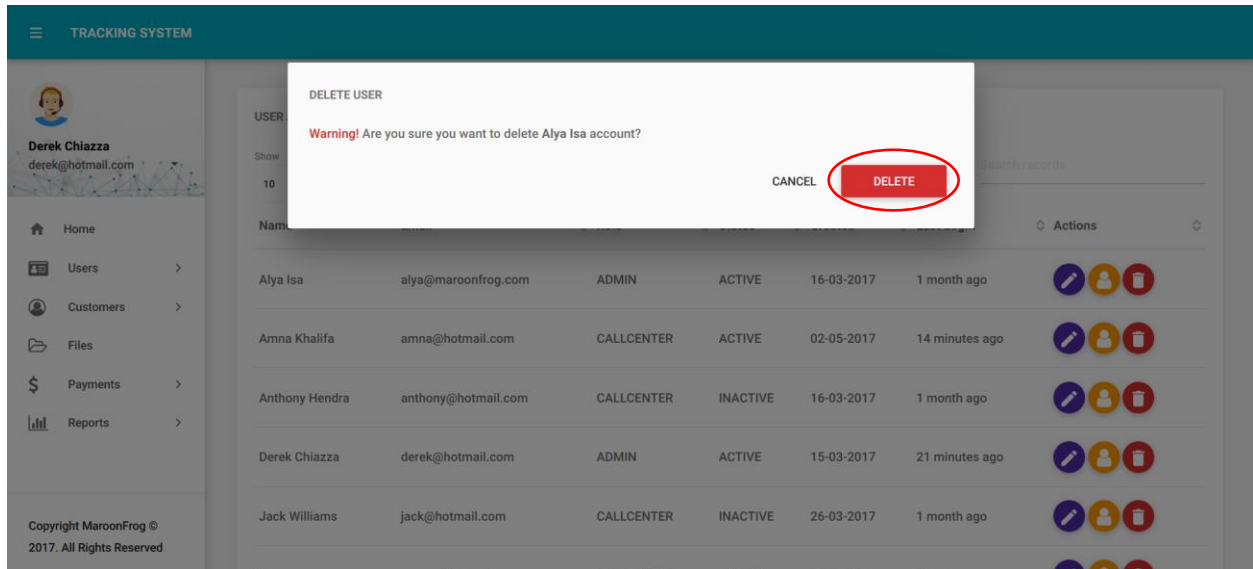


FIGURE 13 - DELETE USER 2

- **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.

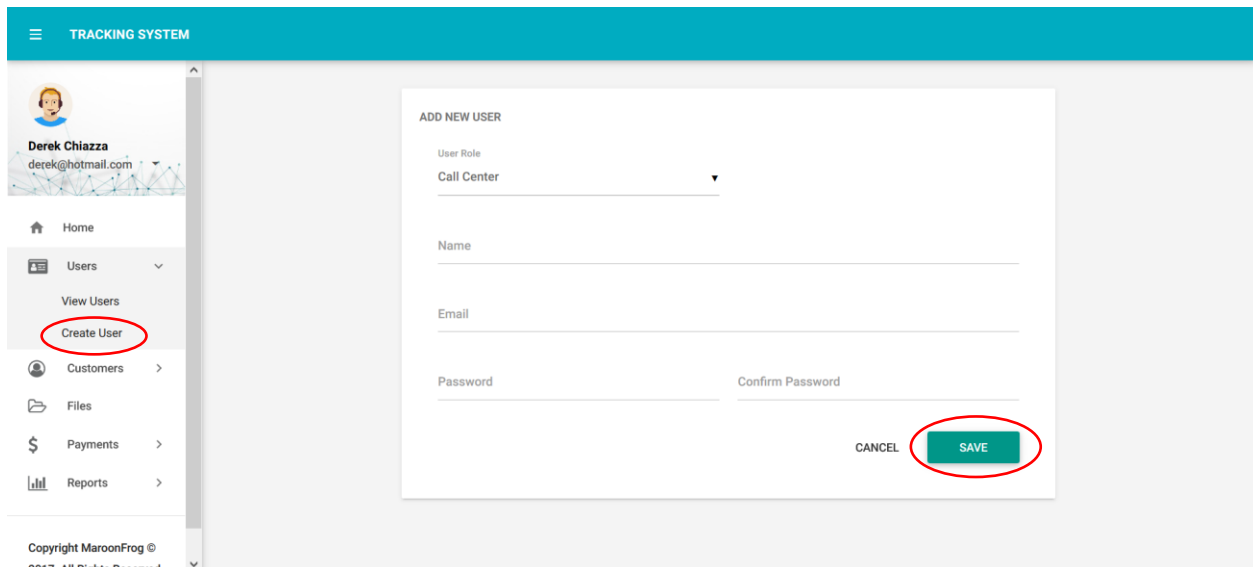


FIGURE 14 - CREATE USER

## 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.

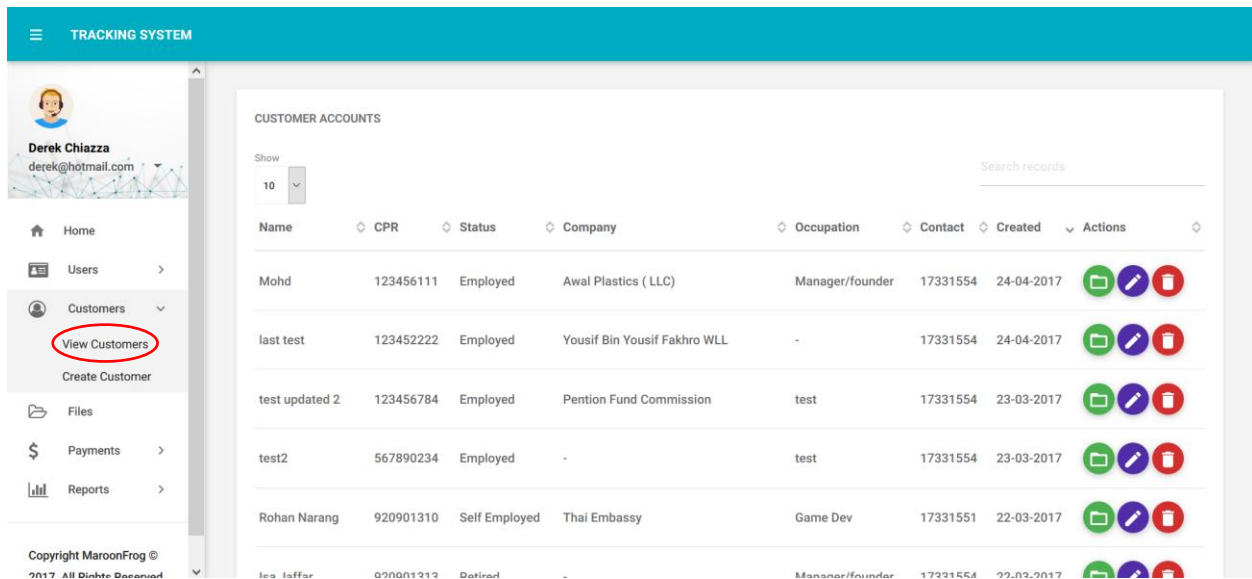


FIGURE 15 - VIEW CUSTOMERS

### ▪ 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.

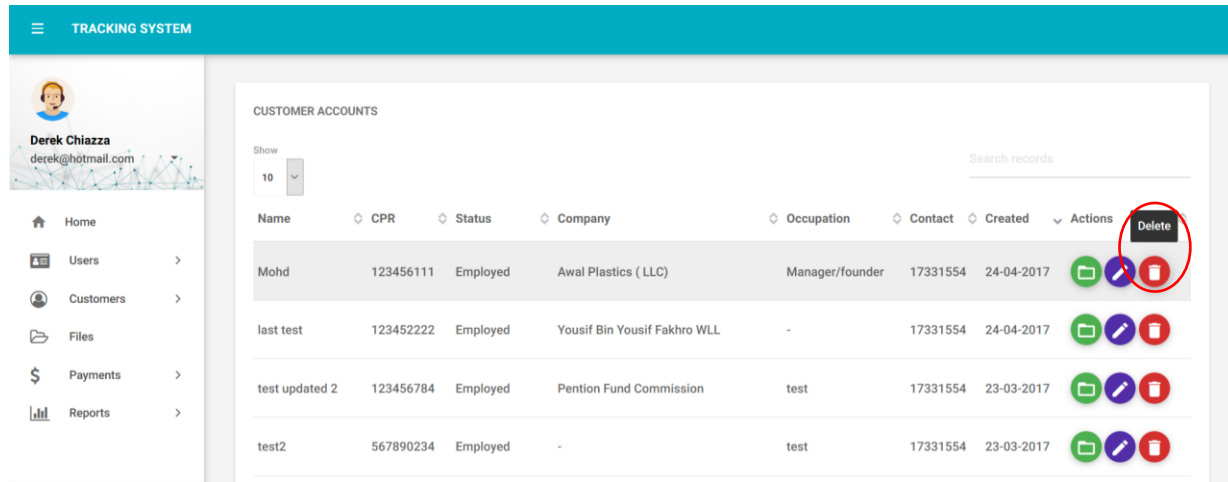
The screenshot shows the 'TRACKING SYSTEM' interface. On the left is a sidebar with a user profile for 'Derek Chiazza' and a menu with options: Home, Users, Customers (with sub-options View Customers and Create Customer), Files, Payments, and Reports. The main area is titled 'CUSTOMER ACCOUNTS' and features a table with columns: Name, CPR, Status, Company, Occupation, Contact, Created, and Actions. The first row is highlighted, and its 'Actions' column contains three icons: a green square, a blue pencil (circled in red), and a red square. Below the table are four more rows of customer data.

Name	CPR	Status	Company	Occupation	Contact	Created	Actions
Mohd	123456111	Employed	Awal Plastics ( LLC)	Manager/founder	17331554	24-04-2017	[Green] [Edit] [Red]
last test	123452222	Employed	Yousif Bin Yousif Fakhro WLL	-	17331554	24-04-2017	[Green] [Edit] [Red]
test updated 2	123456784	Employed	Pention Fund Commission	test	17331554	23-03-2017	[Green] [Edit] [Red]
test2	567890234	Employed	-	test	17331554	23-03-2017	[Green] [Edit] [Red]

**FIGURE 16 - EDIT CUSTOMER 1**

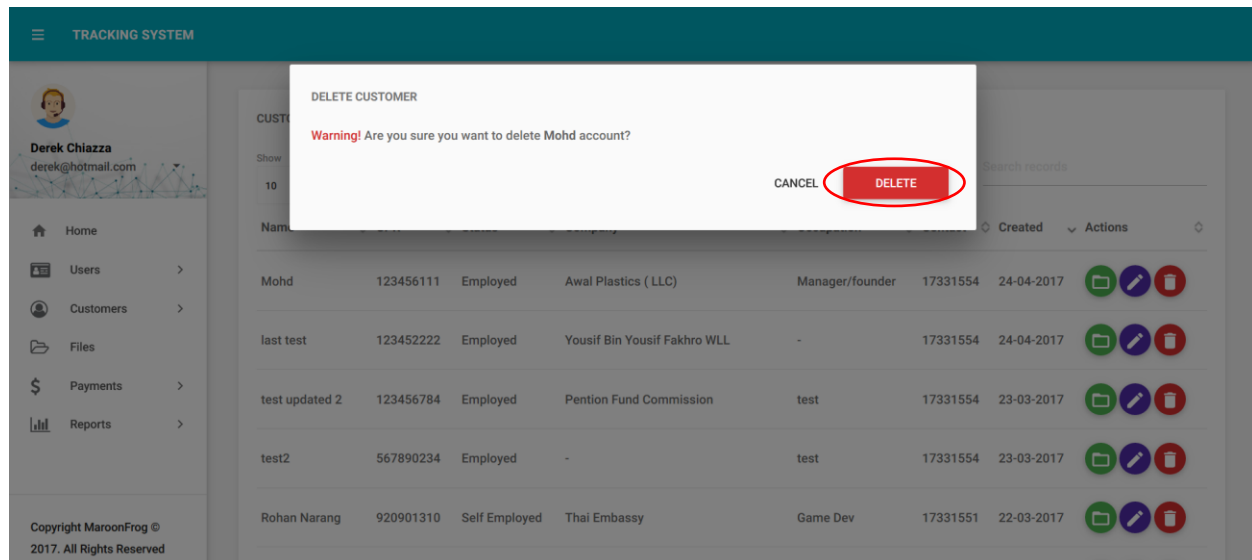
2. Edit the required fields then click on “Update” button, as shown in Figure 17.





**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.

TRACKING SYSTEM

Derek Chiazza  
derek@hotmail.com

Home  
Users  
Customers  
View Customers  
**Create Customer**  
Files  
Payments  
Reports

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**ADD NEW CUSTOMER**

**Personal Information**

Name \*  
CPR/CR \*      Age  
Address  
Contact \*  
Reference \*      Phone Number \*  
Reference \*      Phone Number \*  
Reference      Phone Number  
Reference      Phone Number  
Reference      Phone Number

**Work Details**

Please select work status      Specify Other  
Please select loan type      Specify Other  
Please select company name      Specify Company  
CR      Occupation  
Employee Number      salary  
Date of Employment

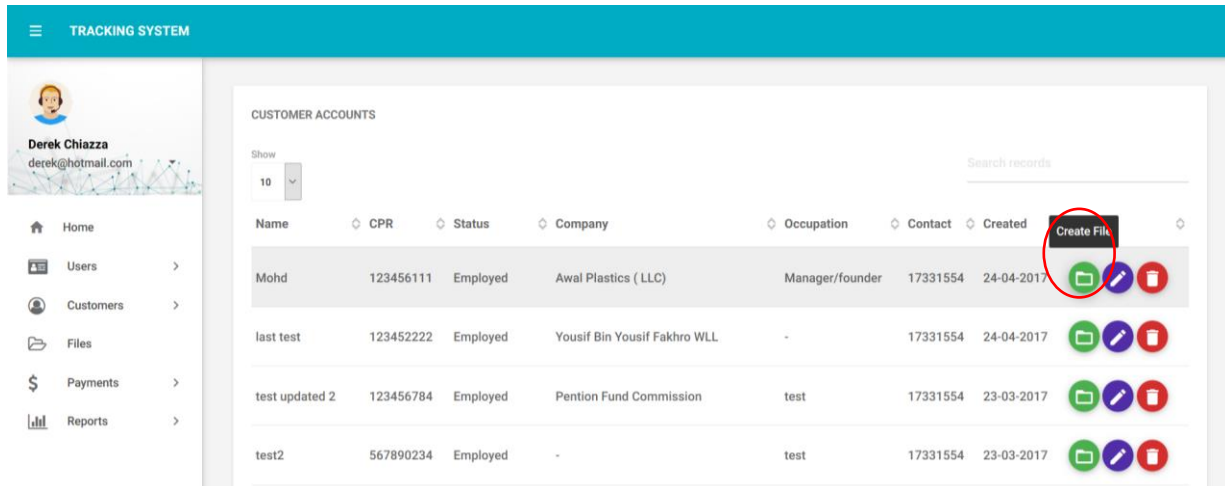
CANCEL      **SAVE**

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.

TRACKING SYSTEM

Derek Chiazza  
derek@hotmail.com

- Home
- Users >
- Customers >
- Files
- Payments >
- Reports >

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CREATE NEW FILE

Loan Type  
Personal loan

Documents Provided:

- Pay slip
- Bank statement
- CPR
- Original passport copy
- Outstanding
- Salary letter
- Pension loan
- Eskan loan
- Lease loan
- Rent agreement
- Visa Card
- Salary transfer letter
- Title deals

CANCEL NEXT →

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.

TRACKING SYSTEM

**Derek Chiazza**  
derek@hotmail.com

- Home
- Users >
- Customers >
- Files
- Payments >
- Reports >

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CREATE NEW FILE - CONFIRM CONTRACT DETAILS  
FILE NO. 32

Customer Name:	CPR/CR:
Mohd	123456111
Address:	Contact:
house: 345, road: 234, block 213 Muharraq	17331554

Total Amount: BHD

**CREATE**

**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.

TRACKING SYSTEM

**Derek Chiazza**  
derek@hotmail.com

- Home
- Users
- Customers
- Files
- Payments
- Reports

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CONTRACT DOCUMENT

File No: 32

2017-06-04 تاريخ تحرير العقد: 04-06-2017

1- (الطرف الأول)  
خدمات همزة الوصل التطوير (إيزون) هي مؤسسة قدية مسجلة بموجب السجل التجاري وتحت رقم 3\_70784 على الفرع ثلاثة لتصاحبه حبيب منصور نعمة بحريتي بظافة سكانية رقم 730206874 وبموجب شهادة السجل التجاري الصادرة من وزارة الصناعة والتجارة حيث تتناول الأنشطة التالية: (مكتب ادارى التطوير مبيعات الشرايات والمؤسسات المحلية والاجنبية، تحصيل ديون، مكاتب القومسيون (تاجر بالعمولة)، مركز الاتصالات.)

2- (الطرف الثاني)

Customer Name: Mohd  
CPR/CR: 123456111 Age: 35  
Address: house: 345, road: 234, block 213 Muharraq  
Contact: 17331554

شروط الاتفاق بين الطرفين كالتالي:  
البنود الأولى: المعاملة التي سيؤديها الطرف الأول تخليص معاملة الطرف الثاني وهي (تسهيلات بنكية) بموجب العقد المبرم يقوم الطرف الاول بعملية تجارية (تخليص معاملة) وتكريب وجهات النظر فقط واخذ العمولة حسب القانون المتعلق بين الطرفين.  
البنود الثاني: يحدد الطرف الأول مدة انتهاء الخدمة أو المعاملة ولا يحق للطرف الثاني الاعتراض عليها حيث تختلف المعاملات على حسب نوع الخدمة.  
البنود الثالث: يلتزم الطرف الثاني بتوفير جميع المستندات والمعلومات لإجراء المعاملة إلى الطرف الأول حسب المطلوب.  
البنود الرابع: تعتبر المعاملة لاجبة في حال تأخر الطرف الثاني في توفير المستندات والأوراق اللازمة للمعاملة في غضون شهر من تاريخ المعاملة وفي حالة طلب الطرف الثاني بمواصلة المعاملة من الطرف الأول تصيب رسوم جديدة لتفتح الملف بعد موافقة الطرف الأول.  
البنود الخامس: يحق للطرف الأول بالاحتفاظ بنسخ من معاملات الطرف الثاني في حالة إنجاز المعاملة أو توقيعها أو إعلانها والرجوع لها لو استدعى الأمر بأي حال وأمام جميع الجهات الرسمية والحكومية.  
البنود السادس: أ- اتفق طرفين الأول والثاني أن تكون أتعاب الطرف الأول مقابل تخليص المعاملة والخدمة مبلغ BHD 123,434.000 تسدد بالشروط التالية:-  
إذا طلب دفع مقدم عند بدء فتح الملف تدفع من قبل الطرف الثاني إلى الطرف الأول وقيل إجراء المعاملة ولا يحق للطرف الثاني استرجاعها في حالة رفض أو قبول المعاملة سواء من المكتب أو من الجهة الرسمية أو الحكومية وتعتبر رسوم ادارية.  
ب- تدفع رسوم واتعاب المعاملة بعد انتهاء المعاملة من نفس اليوم مباشرة ويحسب على الطرف الثاني عن كل تأخير (-/50 دينار بحريني لكل شهر ولا يحق له الرضا أو الطعن أو المعارضة أمام أي جهة.  
ت- في حالة عدم التزام الطرف الثاني بدفع أتعاب ورسوم الخدمة أو المعاملة المتفق عليها بالعدد فإنه يحق للطرف الأول اتخاذ التدابير القانونية أمام الجهات الرسمية ومراكز الشرطة والنيابة العامة والمحاكم أي ما كان موقع الطرف الثاني سواء بمصلحة البحرين أو خارجها وأمام محاكم الأمور المستعجلة ويلتزم الطرف الثاني بدفع الرسوم والأتعاب المتفق عليها والمثلية في العقد والاتفاق وعن كل شهر تأخير كما يلتزم بجميع مصاريف ورسوم المحكمة وأتعاب المحامي.  
البنود السابع: يتعهد الطرف الثاني بعدم التمثل في إجراءات الطرف الأول وإنشاء العقد أو المعاملة أو الخدمة وفي حالة ذلك يحق للطرف الأول وقف المعاملة أو الخدمة والإقامة بدفع -/100 دينار بحريني تعويضاً عن الإجراءات التي تمت والإقامة برسوم المعاملة إن كانت قد استُخدمت.  
البنود الثامن: يتم اعتماد البضمة في حالة عدم قدرة الطرف الثاني على القراءة والتكلم وبحضور شاهدين شاهد من قبل الطرف الأول وشاهد من قبل الطرف الثاني وعلى الشهود الالتزام بالشهادة في حالة استدعاهم أمام كافة الجهات الرسمية والحكومية.  
البنود التاسع: في حالة توقيع العقد المبرم بين الطرفين يتم الاستقالة قانونية ولا يحق لأحد التخلي عن الشروط المبرمة بالعقد حسب القانون.  
البنود العاشر: حرر هذا العقد ويبد الطرف الأول والأصل والطرف الثاني نسخة.

SAVE

FIGURE 24 - CREATE FILE 4

TRACKING SYSTEM

**Derek Chiazza**  
derek@hotmail.com

- Home
- Users
- Customers
- Files
- Payments
- Reports

CONTRACT DOCUMENT

File No: 32

2017-06-04 تاريخ تحرير العقد: 04-06-2017

1- (الطرف الأول)  
خدمات همزة الوصل التطوير (إيزون) هي مؤسسة قدية مسجلة بموجب السجل التجاري الصادرة من وزارة الصناعة والتجارة حيث تتناول الأنشطة التالية: (مكتب ادارى التطوير مبيعات الشرايات والمؤسسات المحلية والاجنبية، تحصيل ديون، مكاتب القومسيون (تاجر بالعمولة)، مركز الاتصالات.)

2- (الطرف الثاني)

Customer Name: Mohd  
CPR/CR: 123456111 Age: 35  
Address: house: 345, road: 234, block 213 Muharraq  
Contact: 17331554

شروط الاتفاق بين الطرفين كالتالي:  
البنود الأولى: المعاملة التي سيؤديها الطرف الأول تخليص معاملة الطرف الثاني وهي (تسهيلات بنكية) بموجب العقد المبرم يقوم الطرف الاول بعملية تجارية (تخليص معاملة) وتكريب وجهات النظر فقط واخذ العمولة حسب القانون المتعلق بين الطرفين.  
البنود الثاني: يحدد الطرف الأول مدة انتهاء الخدمة أو المعاملة ولا يحق للطرف الثاني الاعتراض عليها حيث تختلف المعاملات على حسب نوع الخدمة.  
البنود الثالث: يلتزم الطرف الثاني بتوفير جميع المستندات والمعلومات لإجراء المعاملة إلى الطرف الأول حسب المطلوب.  
البنود الرابع: تعتبر المعاملة لاجبة في حال تأخر الطرف الثاني في توفير المستندات والأوراق اللازمة للمعاملة في غضون شهر من تاريخ المعاملة وفي حالة طلب الطرف الثاني بمواصلة المعاملة من الطرف الأول تصيب رسوم جديدة لتفتح الملف بعد موافقة الطرف الأول.  
البنود الخامس: يحق للطرف الأول بالاحتفاظ بنسخ من معاملات الطرف الثاني في حالة إنجاز المعاملة أو توقيعها أو إعلانها والرجوع لها لو استدعى الأمر بأي حال وأمام جميع الجهات الرسمية والحكومية.  
البنود السادس: أ- اتفق طرفين الأول والثاني أن تكون أتعاب الطرف الأول مقابل تخليص المعاملة والخدمة مبلغ BHD 123,434.000 تسدد بالشروط التالية:-  
إذا طلب دفع مقدم عند بدء فتح الملف تدفع من قبل الطرف الثاني إلى الطرف الأول وقيل إجراء المعاملة ولا يحق للطرف الثاني استرجاعها في حالة رفض أو قبول المعاملة سواء من المكتب أو من الجهة الرسمية أو الحكومية وتعتبر رسوم ادارية.  
ب- تدفع رسوم واتعاب المعاملة بعد انتهاء المعاملة من نفس اليوم مباشرة ويحسب على الطرف الثاني عن كل تأخير (-/50 دينار بحريني لكل شهر ولا يحق له الرضا أو الطعن أو المعارضة أمام أي جهة.  
ت- في حالة عدم التزام الطرف الثاني بدفع أتعاب ورسوم الخدمة أو المعاملة المتفق عليها بالعدد فإنه يحق للطرف الأول اتخاذ التدابير القانونية أمام الجهات الرسمية ومراكز الشرطة والنيابة العامة والمحاكم أي ما كان موقع الطرف الثاني سواء بمصلحة البحرين أو خارجها وأمام محاكم الأمور المستعجلة ويلتزم الطرف الثاني بدفع الرسوم والأتعاب المتفق عليها والمثلية في العقد والاتفاق وعن كل شهر تأخير كما يلتزم بجميع مصاريف ورسوم المحكمة وأتعاب المحامي.  
البنود السابع: يتعهد الطرف الثاني بعدم التمثل في إجراءات الطرف الأول وإنشاء العقد أو المعاملة أو الخدمة وفي حالة ذلك يحق للطرف الأول وقف المعاملة أو الخدمة والإقامة بدفع -/100 دينار بحريني تعويضاً عن الإجراءات التي تمت والإقامة برسوم المعاملة إن كانت قد استُخدمت.  
البنود الثامن: يتم اعتماد البضمة في حالة عدم قدرة الطرف الثاني على القراءة والتكلم وبحضور شاهدين شاهد من قبل الطرف الأول وشاهد من قبل الطرف الثاني وعلى الشهود الالتزام بالشهادة في حالة استدعاهم أمام كافة الجهات الرسمية والحكومية.  
البنود التاسع: في حالة توقيع العقد المبرم بين الطرفين يتم الاستقالة قانونية ولا يحق لأحد التخلي عن الشروط المبرمة بالعقد حسب القانون.  
البنود العاشر: حرر هذا العقد ويبد الطرف الأول والأصل والطرف الثاني نسخة.

SAVE

Opening contract\_27.pdf

You have chosen to open:  
contract\_27.pdf  
which is: Adobe Acrobat Document  
from: http://trackingssystem.dev

What should Firefox do with this file?

Open with Adobe Reader (default)

Save File

Do this automatically for files like this from now on.

OK Cancel

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.

The screenshot displays the MaroonFrog Tracking System interface. On the left, a sidebar menu includes 'Home', 'Users', 'Customers', 'Files' (highlighted with a red circle), 'Payments', and 'Reports'. The main content area is titled 'CUSTOMER ACCOUNTS' and features a table with columns: File ID, Name, CPR, Contact, Status, Price (BHD), Contract, Date Created, and Actions. The table lists 19 entries, with the first 10 visible. Each row includes a set of action buttons: a magnifying glass, a document icon, a pencil, and a trash can. The footer of the table indicates 'Showing 1 to 10 of 19 entries' and includes a pagination control showing '1' and '2'.

File ID	Name	CPR	Contact	Status	Price (BHD)	Contract	Date Created	Actions
32	Mohd	123456111	17331554	Initiated/Created	123,434.000	<a href="#">contract_27.pdf</a>	04-06-2017	[View] [Edit] [Delete]
31	test2	567890234	17331554	Initiated/Created	7,676,876.000	<a href="#">contract_26.pdf</a>	15-05-2017	[View] [Edit] [Delete]
30	Rohan Narang	920901310	17331551	Initiated/Created	12,345.000	<a href="#">contract_25.pdf</a>	04-05-2017	[View] [Edit] [Delete]
28	last test	123452222	17331554	Pending payment	12,312.000	<a href="#">contract_23.pdf</a>	30-04-2017	[View] [Edit] [Delete]
27	Harry Potter	920901312	17331554	Initiated/Created	10,203,947.000	<a href="#">contract_22.pdf</a>	28-04-2017	[View] [Edit] [Delete]
26	last test	123452222	17331554	Initiated/Created	-	-	24-04-2017	[View] [Edit] [Delete]
25	Mohd	123456111	17331554	Initiated/Created	12,345.000	<a href="#">contract_21.pdf</a>	24-04-2017	[View] [Edit] [Delete]
21	Rohan Narang	920901310	17331551	Approved by Bank	5,678.000	<a href="#">contract_20.pdf</a>	16-04-2017	[View] [Edit] [Delete]
17	Rohan Narang	920901310	17331551	Missing document	6,576.000	<a href="#">contract_19.pdf</a>	13-04-2017	[View] [Edit] [Delete]
16	Robbie Williams	123456789	17331554	Initiated/Created	200.000	<a href="#">contract_18.pdf</a>	13-04-2017	[View] [Edit] [Delete]

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.

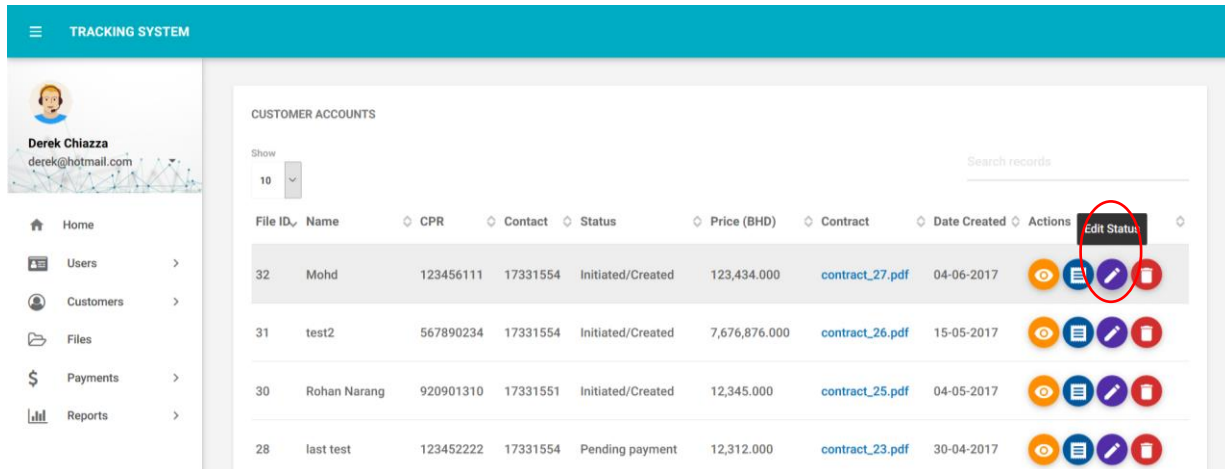


FIGURE 27 - EDIT FILE STATUS 1

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

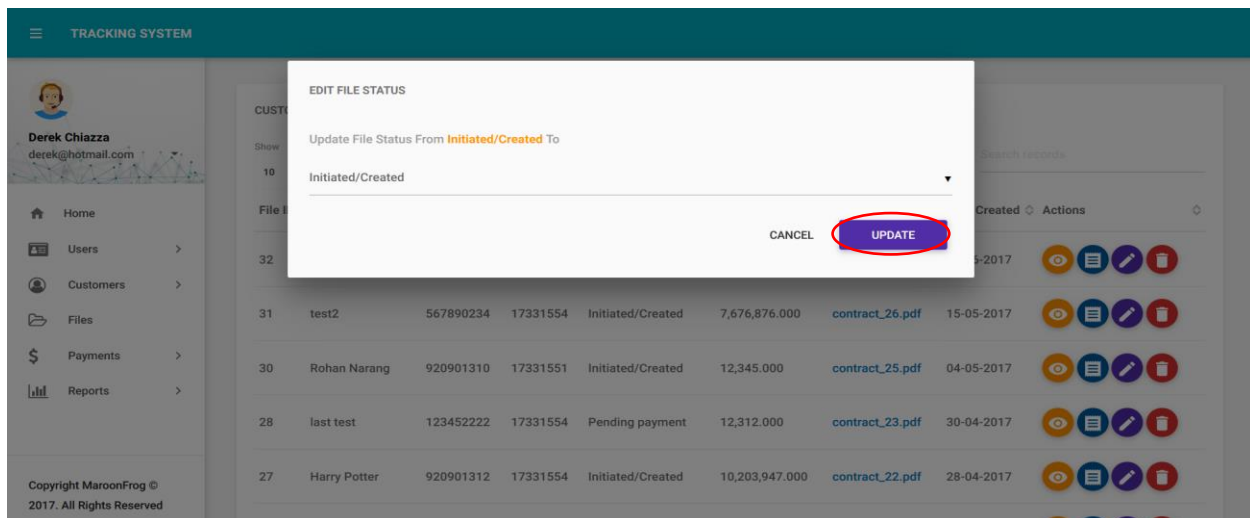
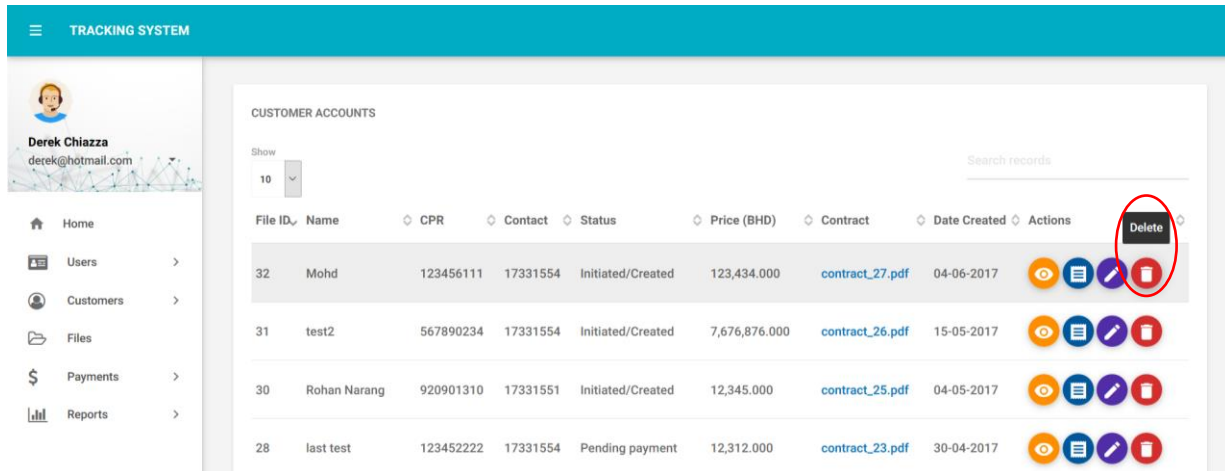


FIGURE 28 - EDIT FILE STATUS 2

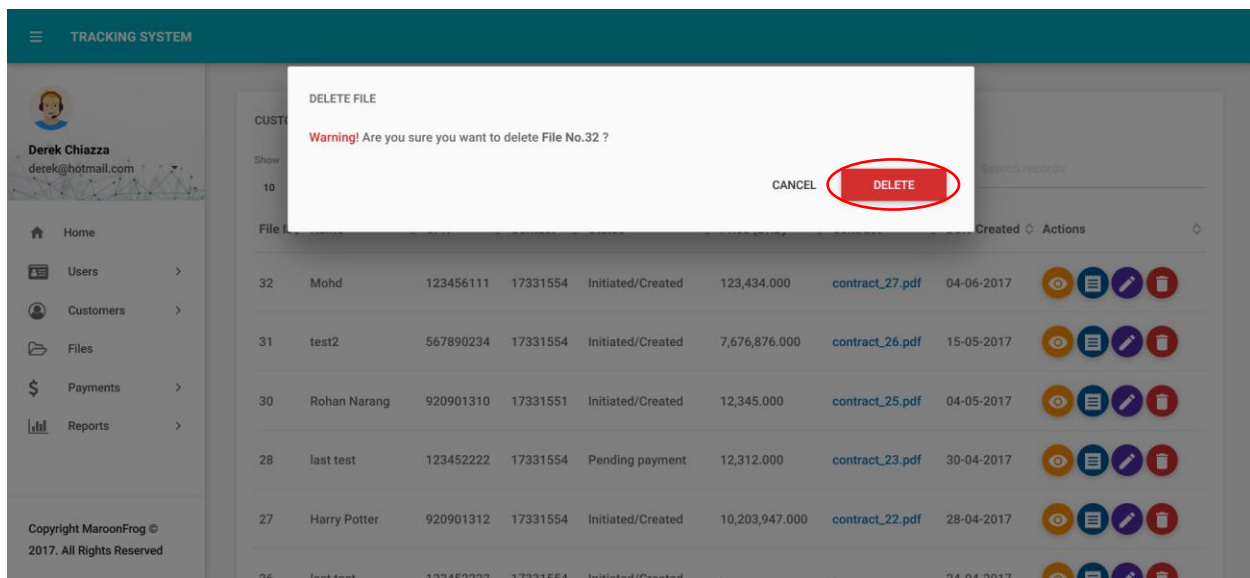
- Delete File

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.

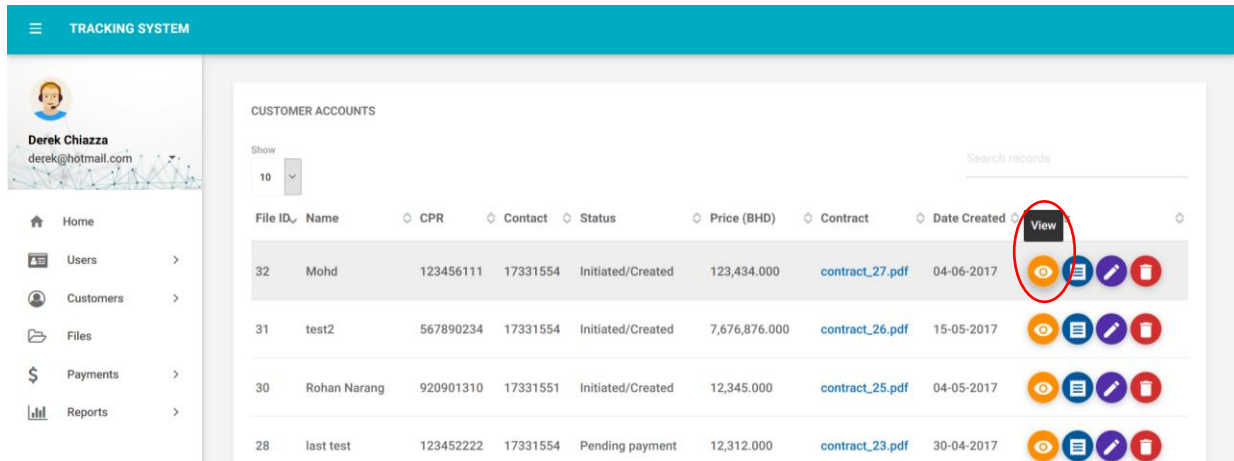


FIGURE 31 - VIEW FILE 1

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

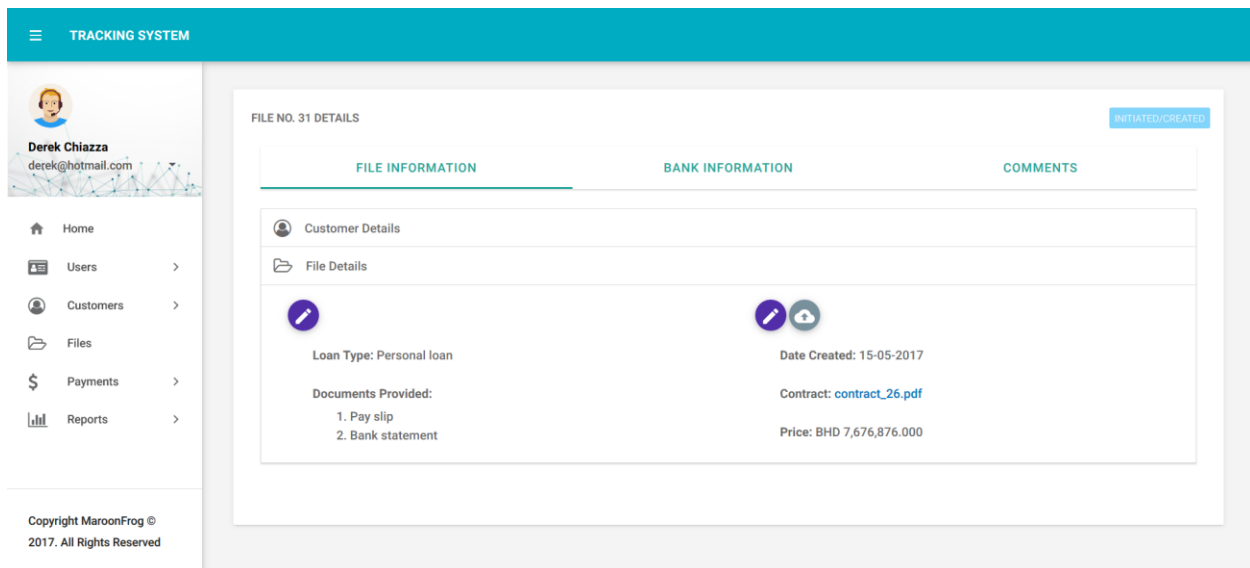


FIGURE 32 - VIEW FILE 2

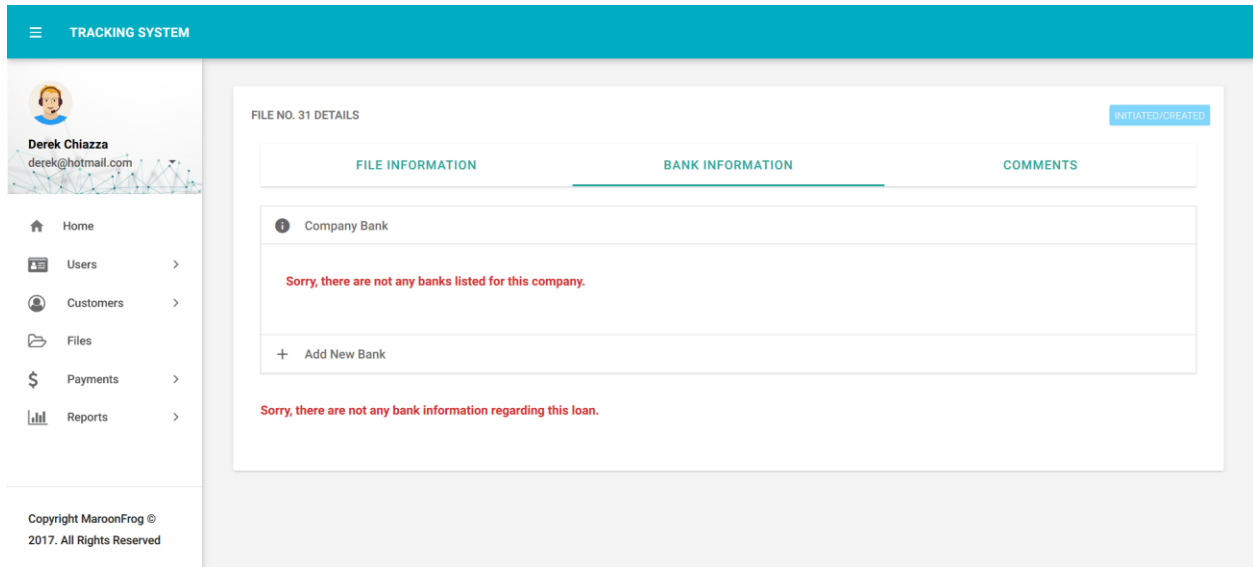


FIGURE 33 - VIEW FILE 3

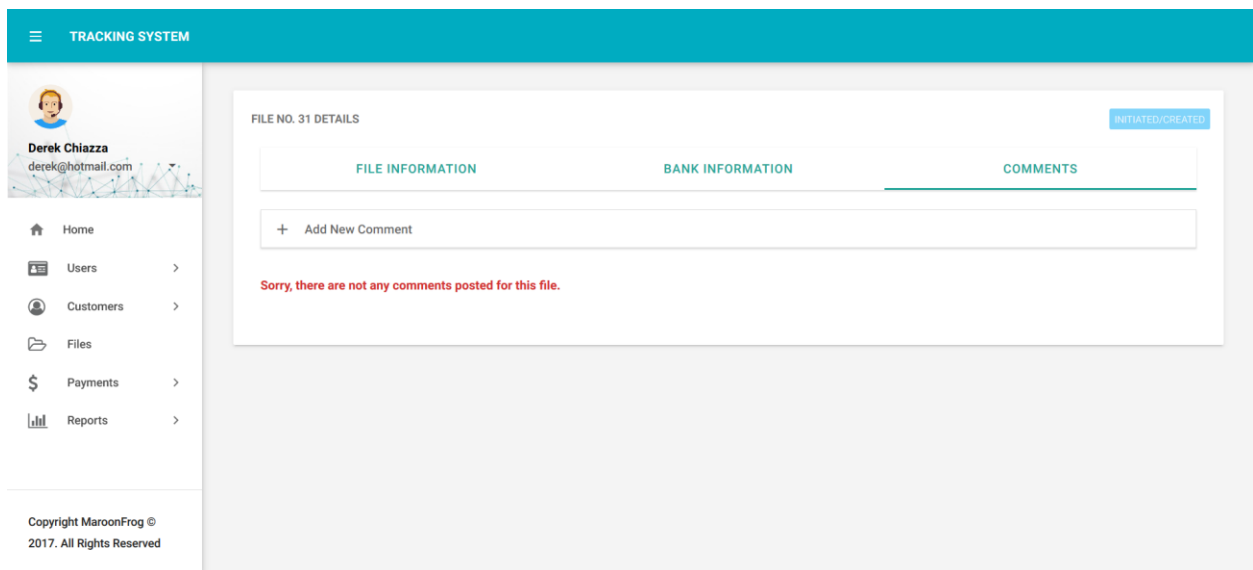


FIGURE 34 - VIEW FILE 4

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

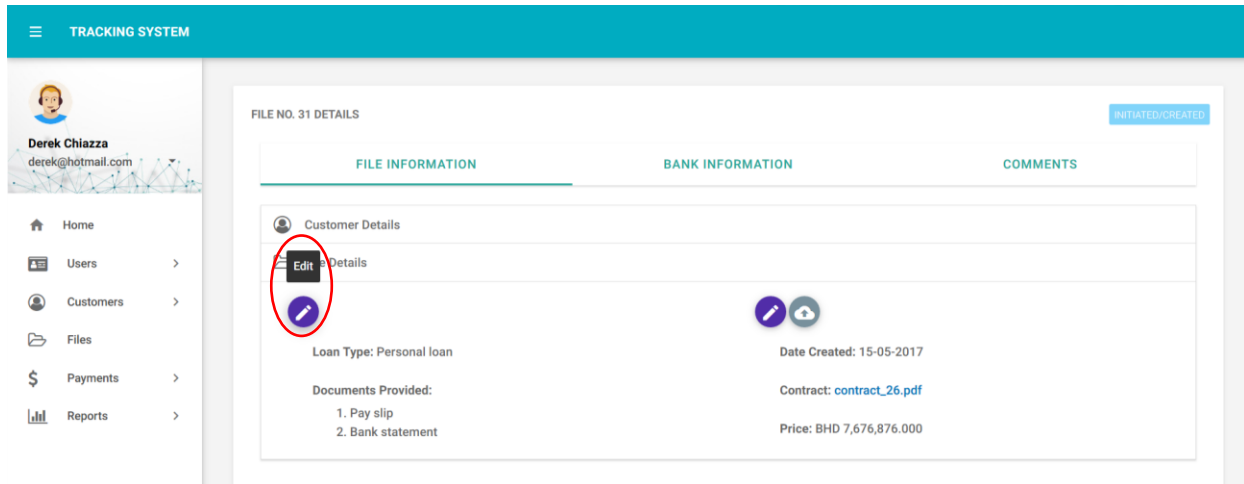


FIGURE 35 - VIEW FILE 5

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

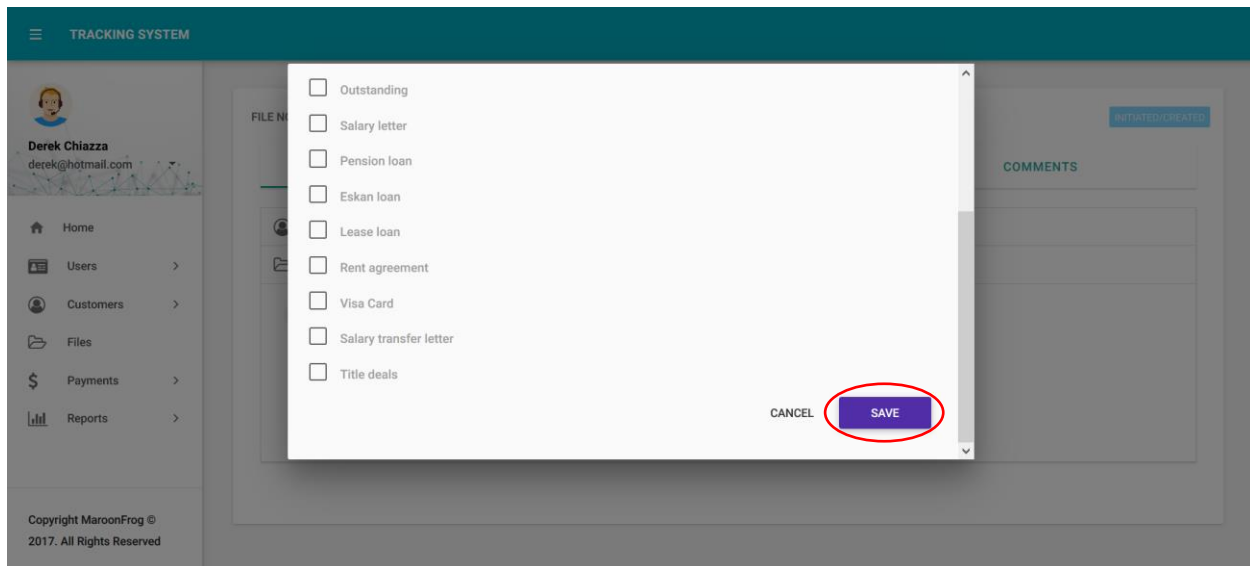


FIGURE 36 - VIEW FILE 6

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

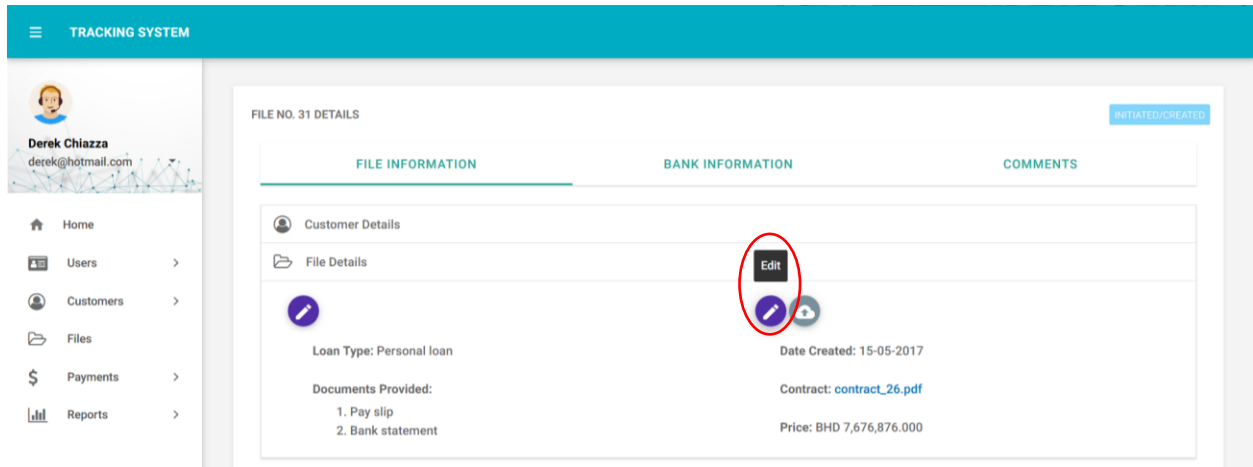


FIGURE 37 - VIEW FILE 7

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.

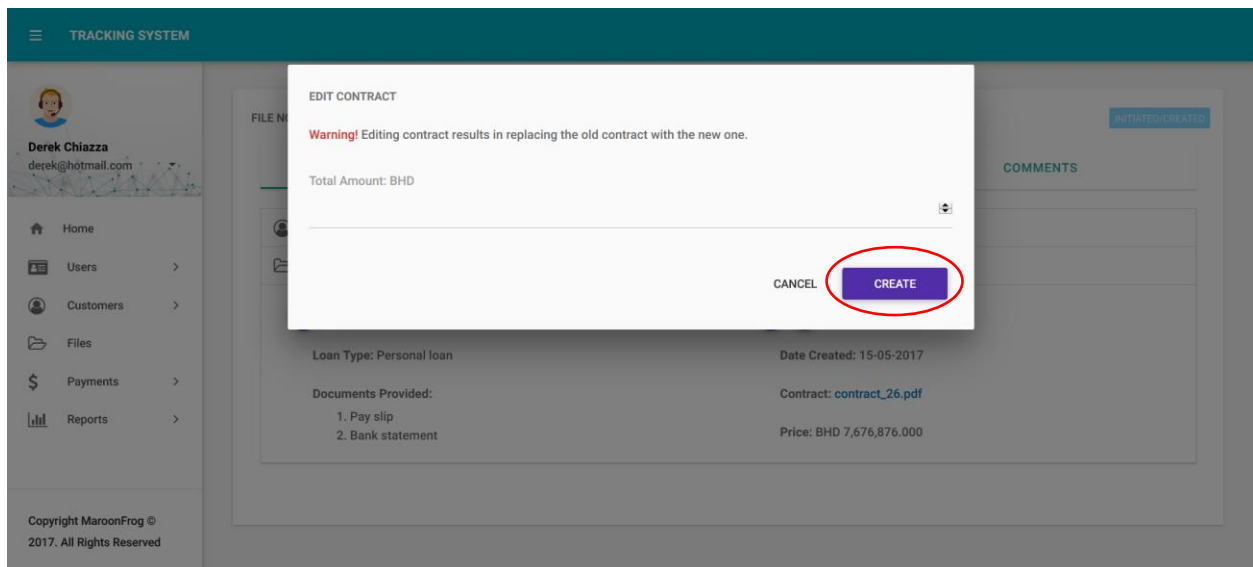
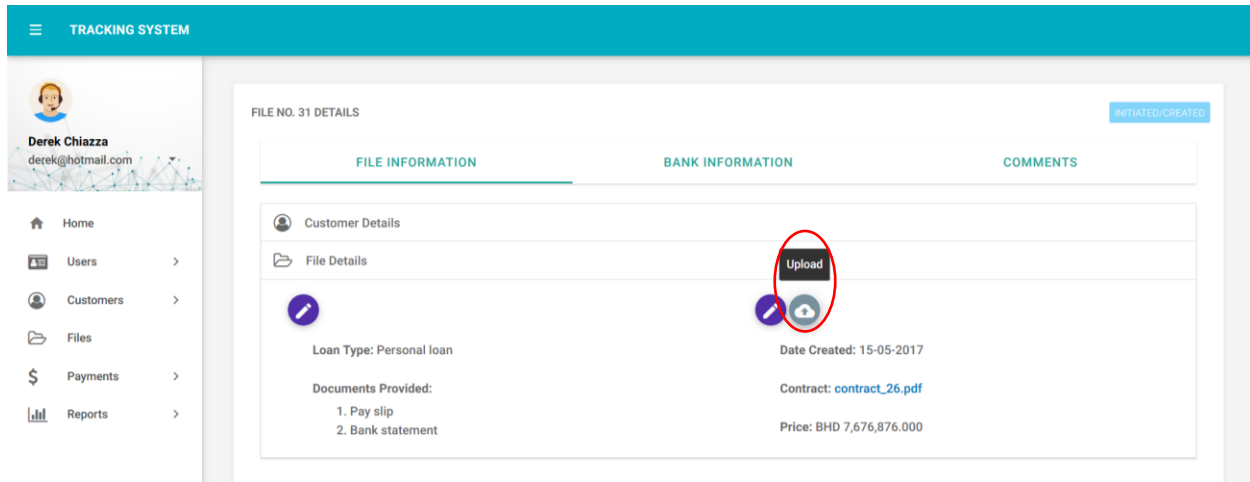


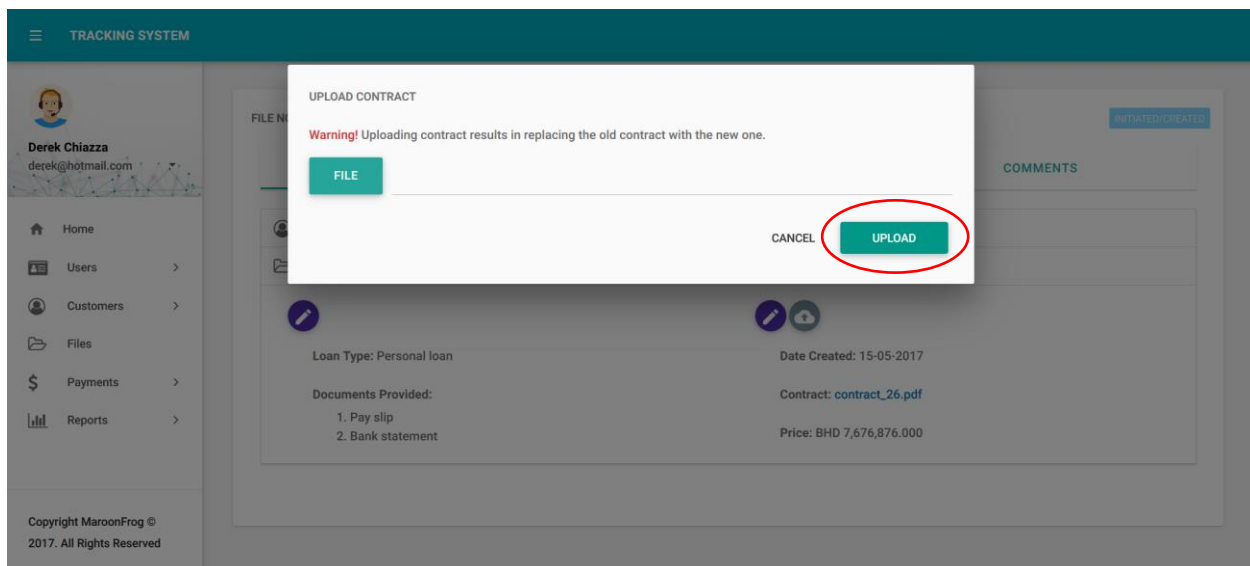
FIGURE 38 - VIEW FILE 8

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



**FIGURE 39 - VIEW FILE 9**

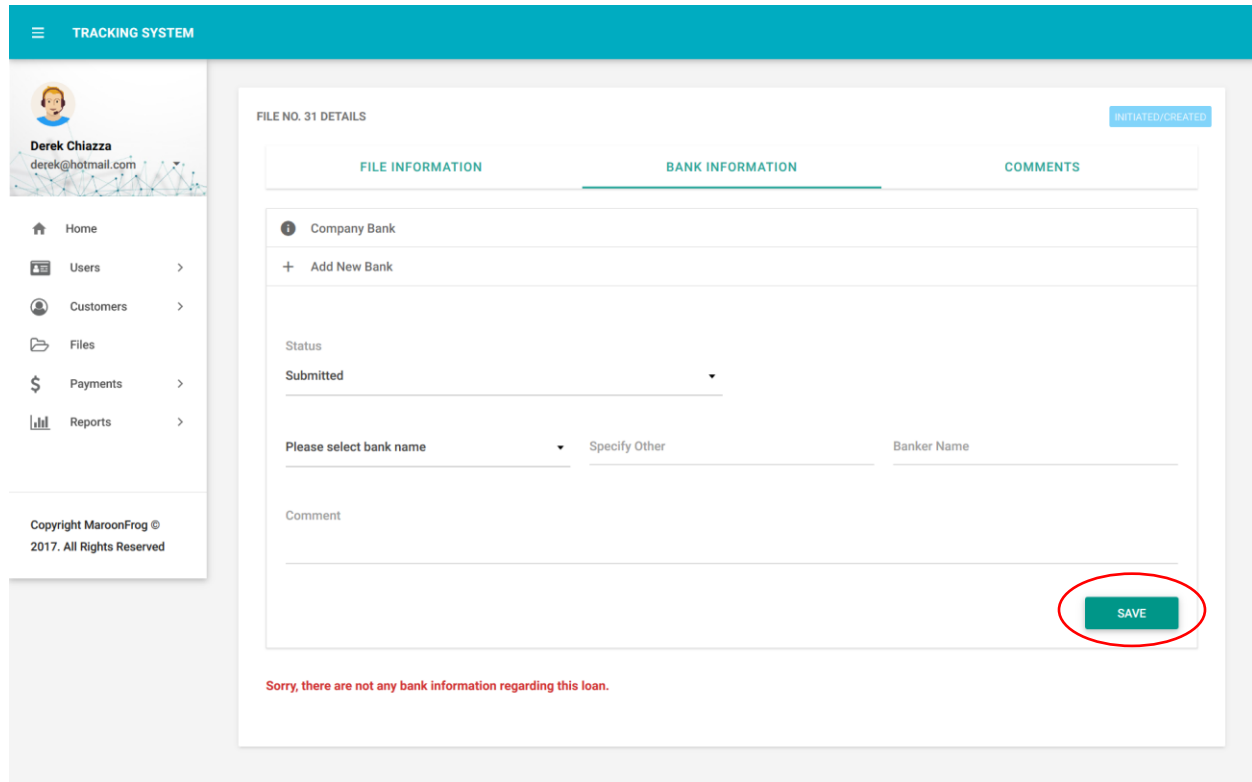
8. Click on “File” in the pop-up window and select the file to be uploaded then click on “Upload” button, as shown in Figure 40. P.S – file type needs to be either PDF or doc to be uploaded.



**FIGURE 40 - VIEW FILE 10**

- **Add Bank Details**

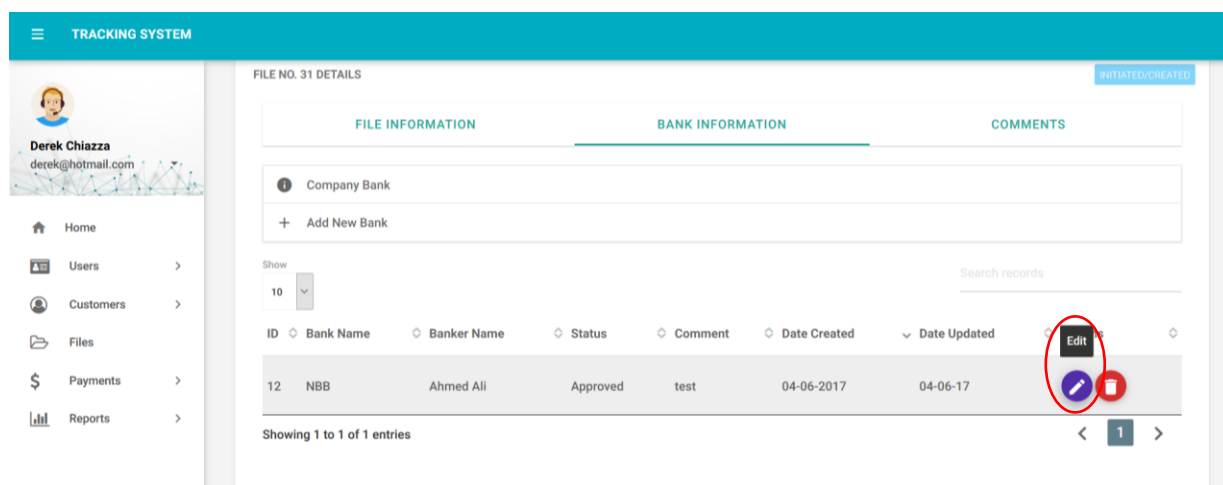
To add Bank Details click on Bank Information tab and then “Add New Bank”. Fill the form with the required fields and click on the “Save” button, as shown in Figure 41.



**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.

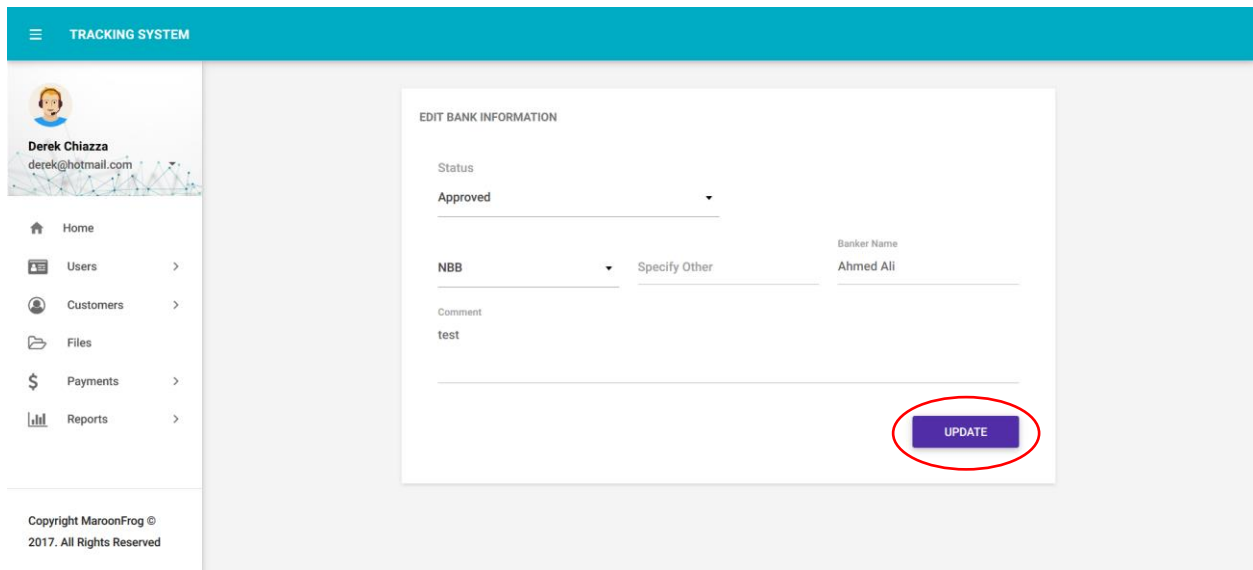


FIGURE 43 - EDIT BANK DETAILS 2

## Delete Bank Details

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

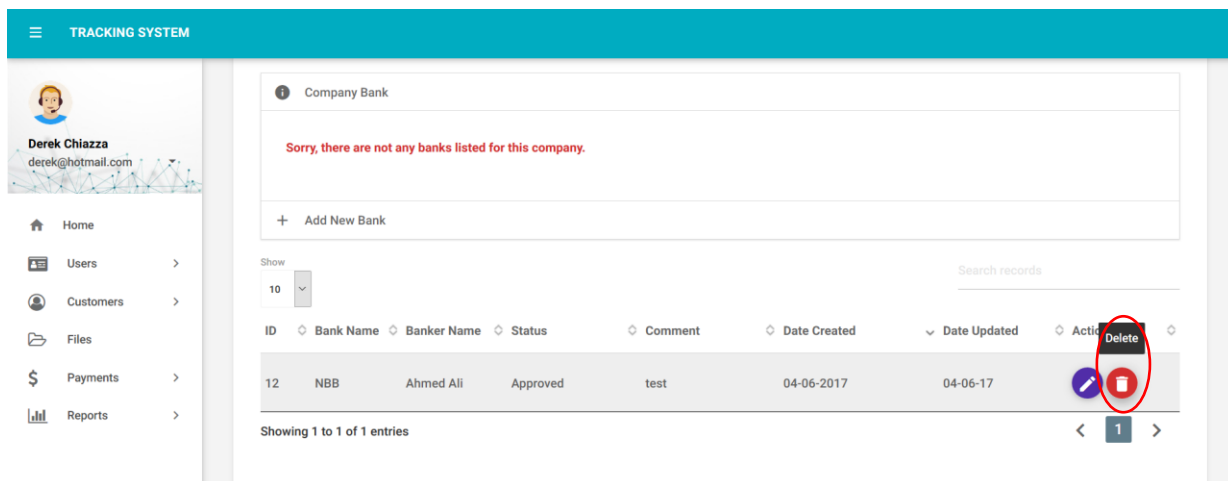


FIGURE 44 - DELETE BANK DETAILS 1

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

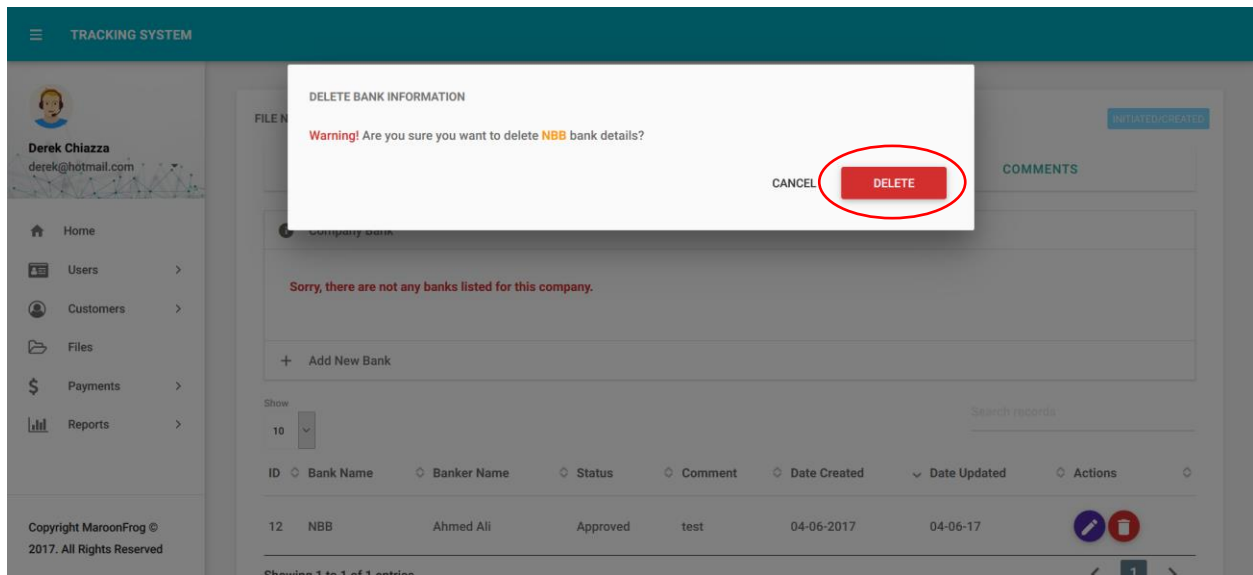


FIGURE 45 - DELETE BANK DETAILS 2

- **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.

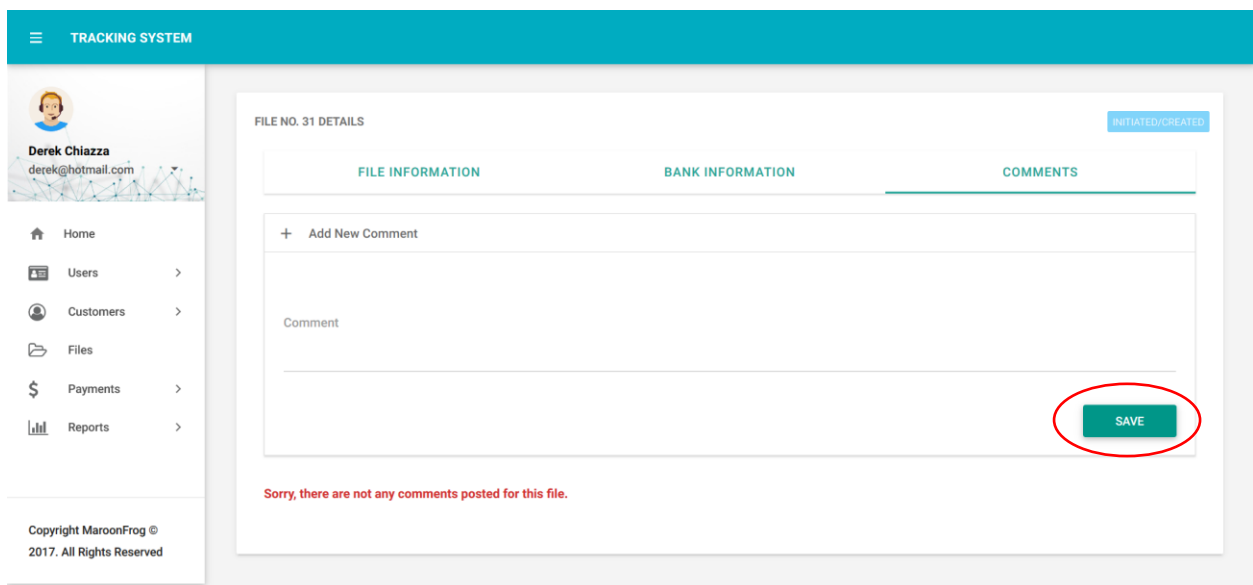


FIGURE 46 - ADD FILE COMMENT

## ▪ Edit File Comment

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

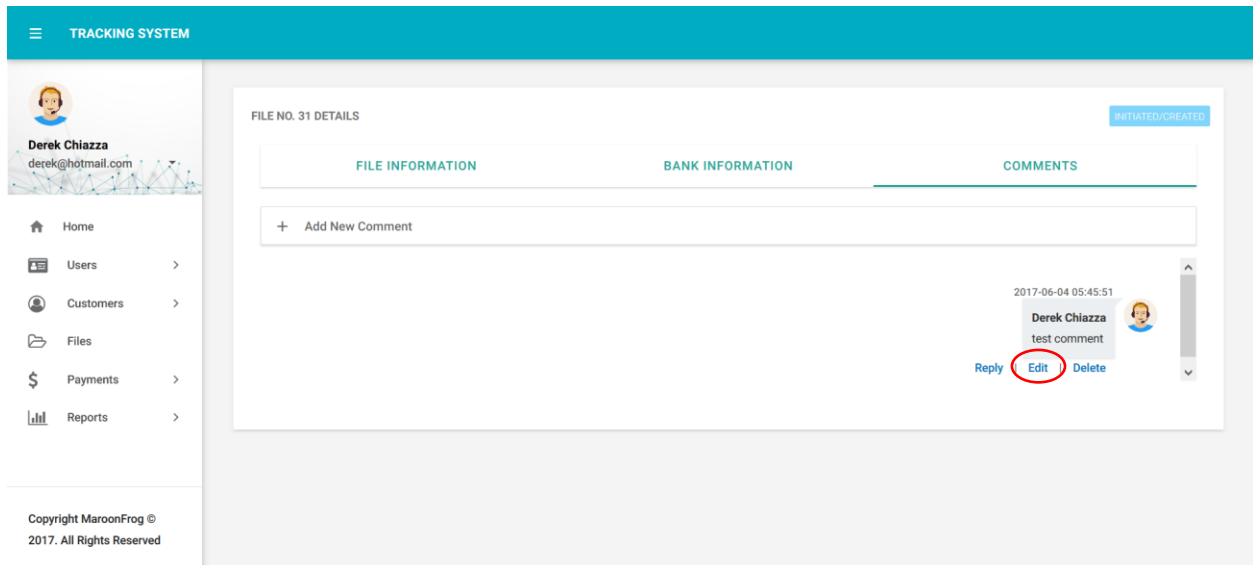


FIGURE 47 - EDIT FILE COMMENT 1

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

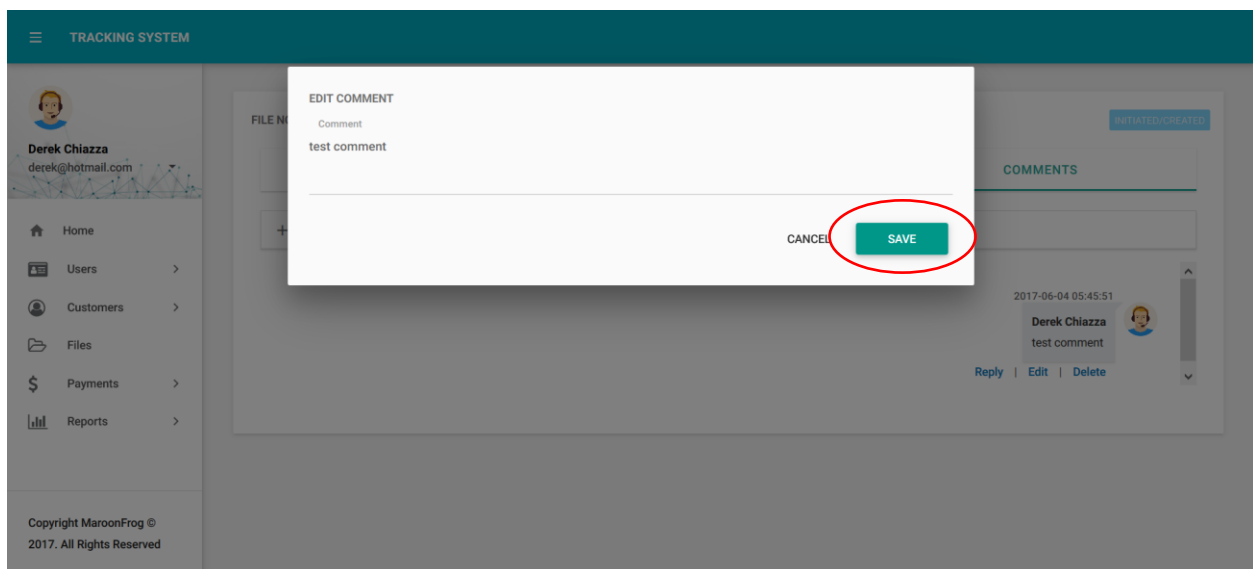
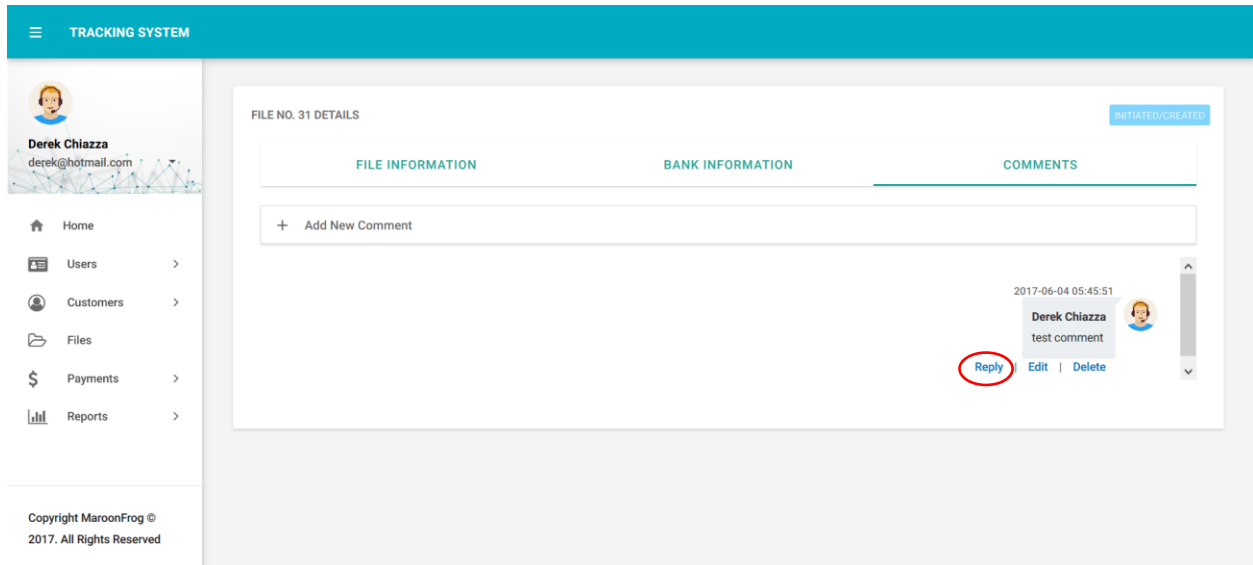


FIGURE 48 - EDIT FILE COMMENT 2

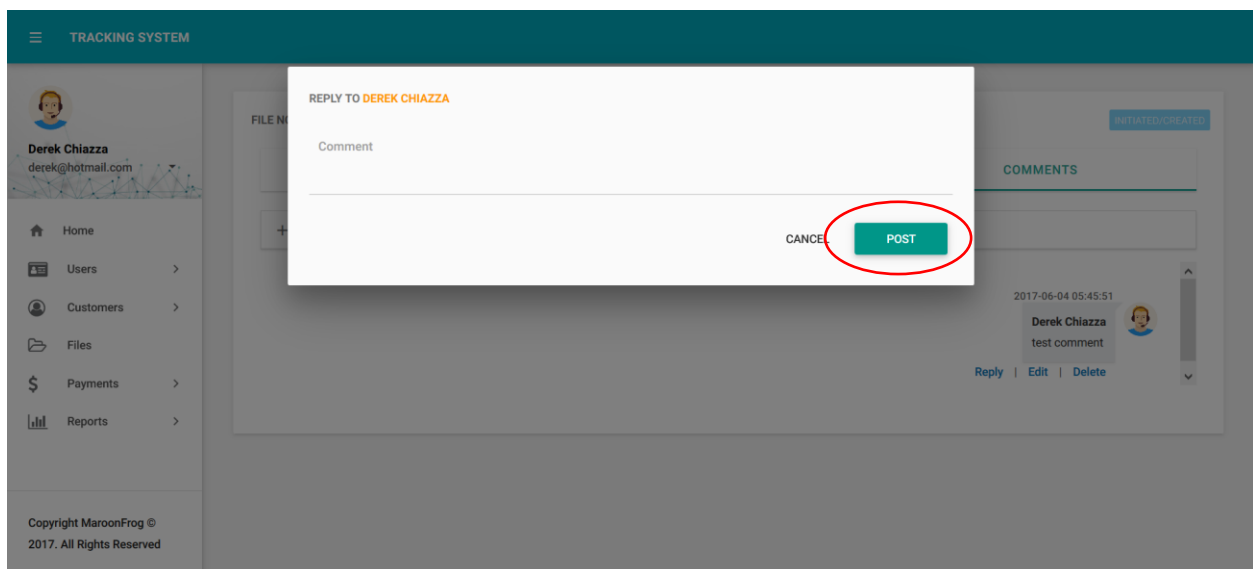
- **Comment on a File Comment**

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.

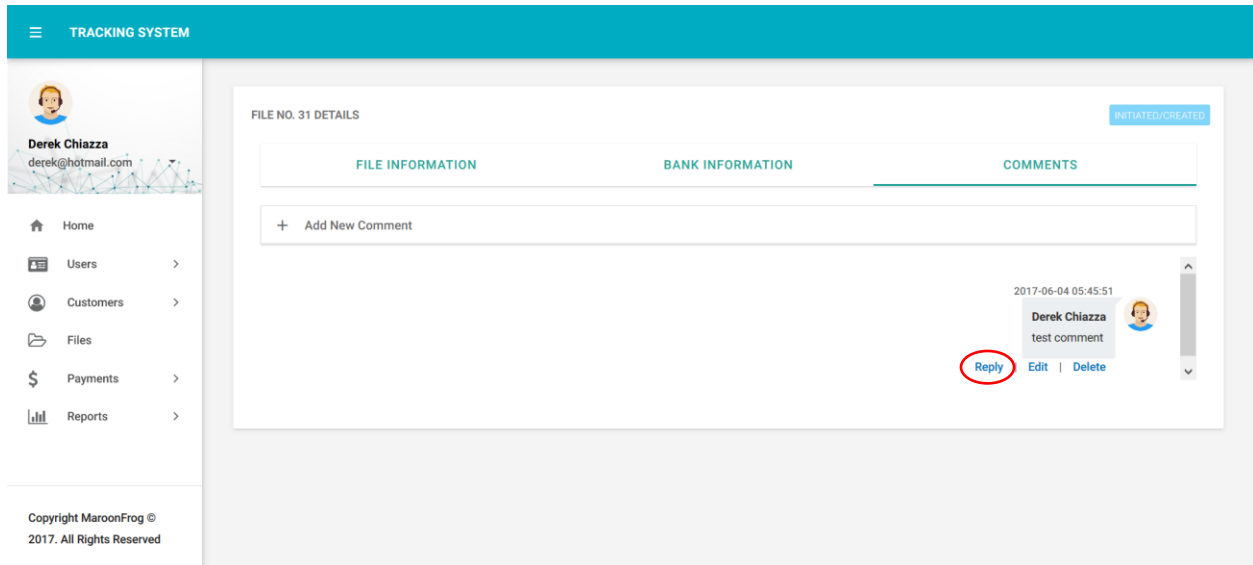


FIGURE 51 - DELETE FILE COMMENT 1

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

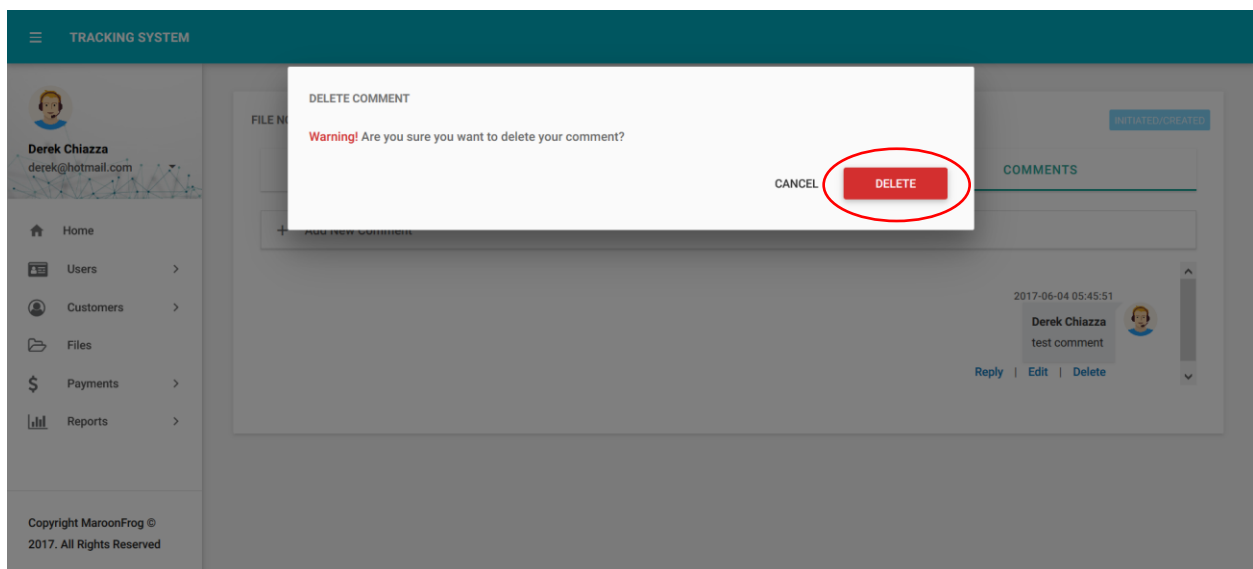


FIGURE 52 - DELETE FILE COMMENT 2

## 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.

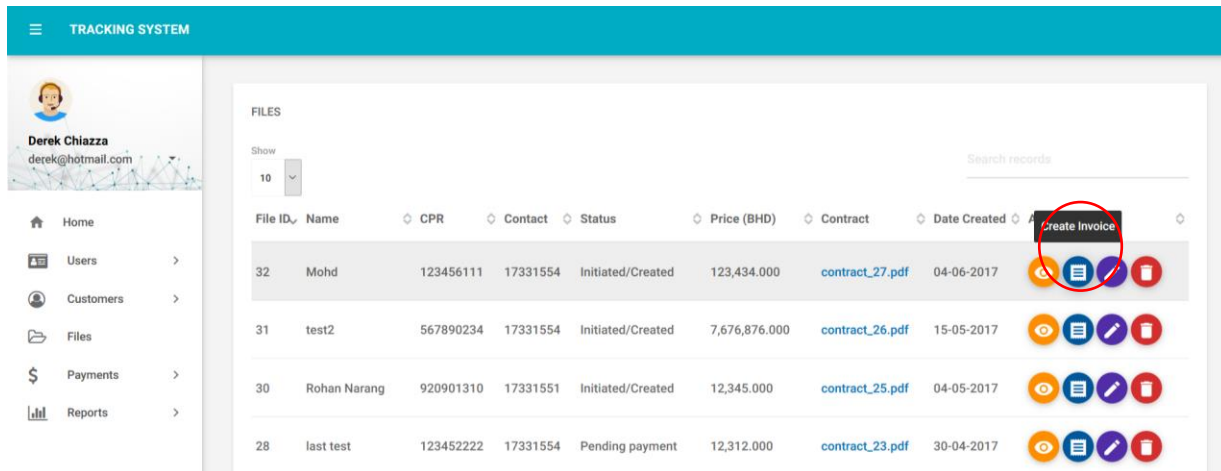



FIGURE 53 - CREATE INVOICE 1

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.

☰ TRACKING SYSTEM


  
**Derek Chiazza**  
derek@hotmail.com

- 🏠 Home
- 👤 Users >
- 👥 Customers >
- 📁 Files
- 💰 Payments >
- 📊 Reports >

Copyright MaroonFrog ©  
 2017. All Rights Reserved

ADD A ROW
SAVE

*LIAISON*  
 123 Appleseed Street  
 Appleville, WI 53719  
 Phone: (555) 555-5555



**INVOICE**

*Mohd*  
 house: 345, road: 234, block 213 Muharraq  
 Phone: 17331554

Invoice Number: #7  
 Customer Number: 25  
 Invoice Date: 04-06-2017

Item	Description	Cost	Quantity	Total
Item Name	Description	0.000	0	0.000
Item Name	Description	0.000	0	0.000
				Subtotal
				0.000
				Total
				0.000
				Amount Paid
				0.000
				Balance Due
				0.000

**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.

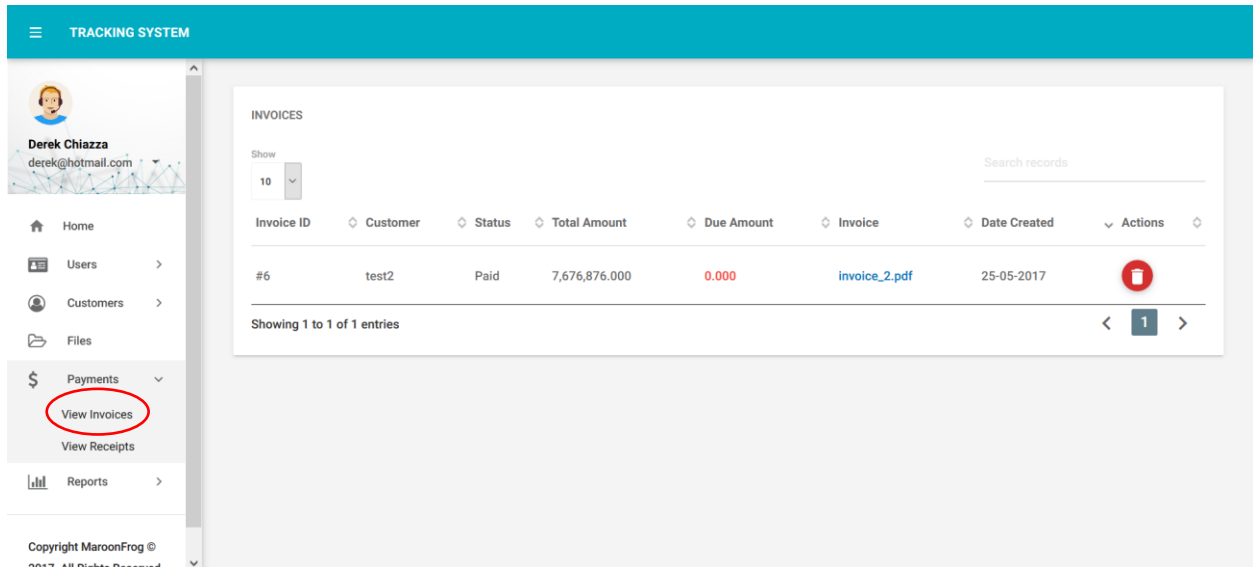


FIGURE 55 - VIEW INVOICES

- **Delete Invoice - Administrator**

1. To delete an invoice click on “Delete” button on the invoice’s row, as shown in Figure 56.

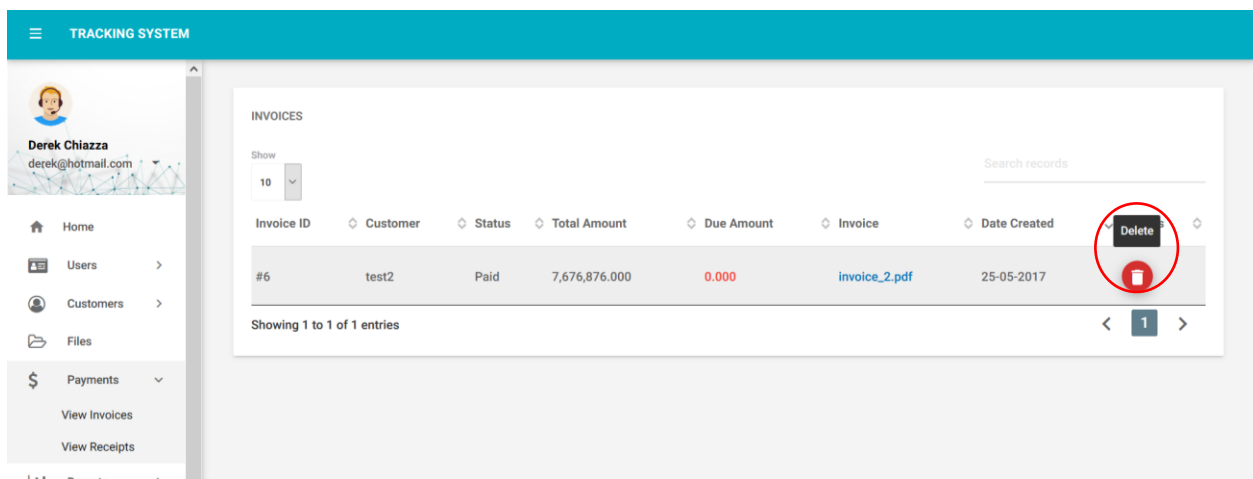


FIGURE 56 - DELETE INVOICE 1

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

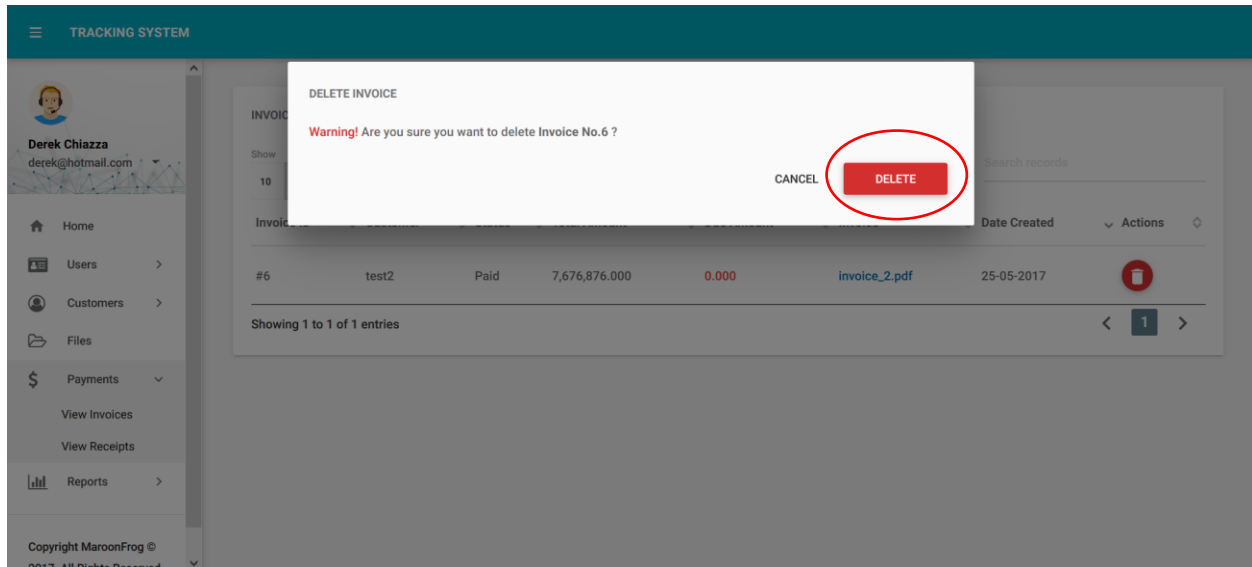


FIGURE 57 - DELETE INVOICE 2

- **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.

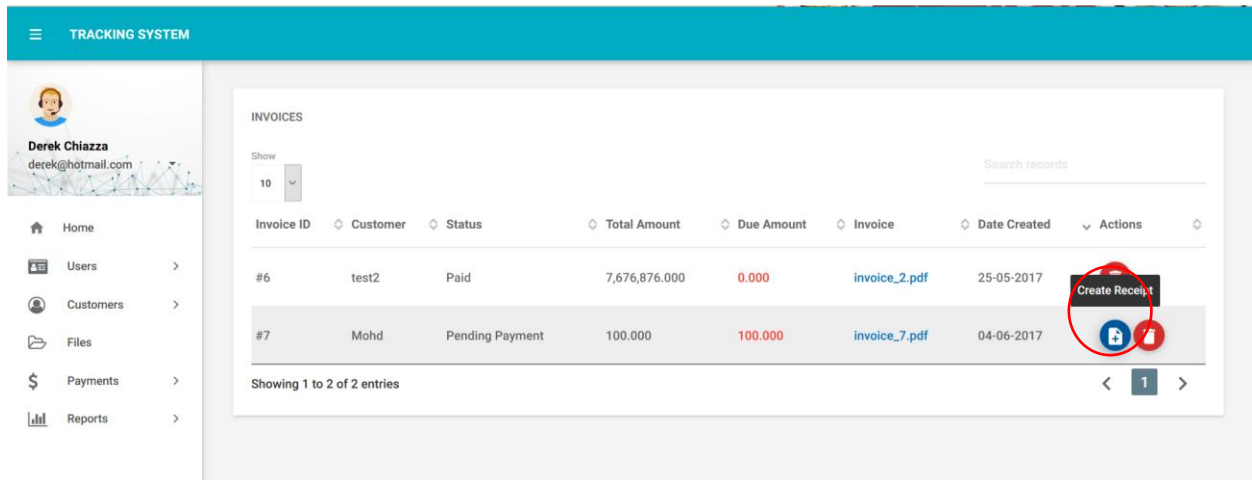


FIGURE 58 - CREATE RECEIPT 1

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.

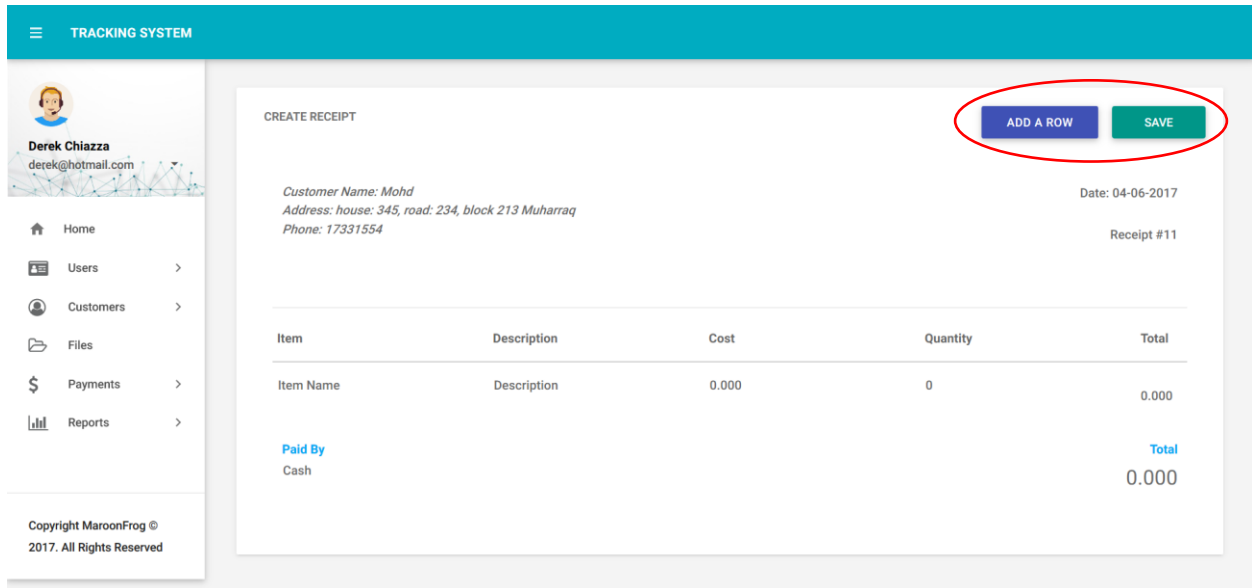


FIGURE 59 - CREATE RECEIPT 2

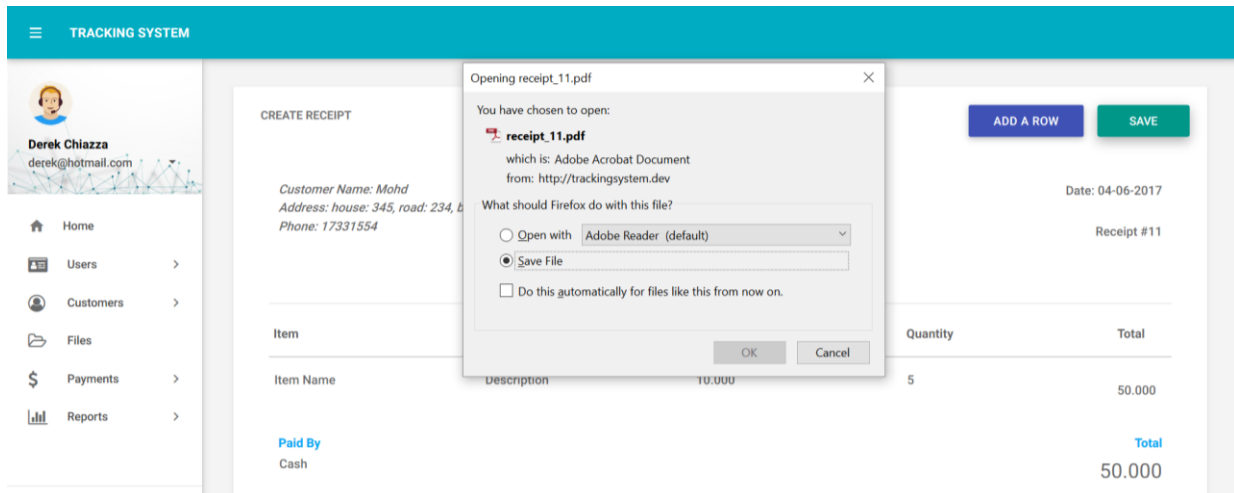


FIGURE 60 - CREATE RECEIPT 3

- 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.

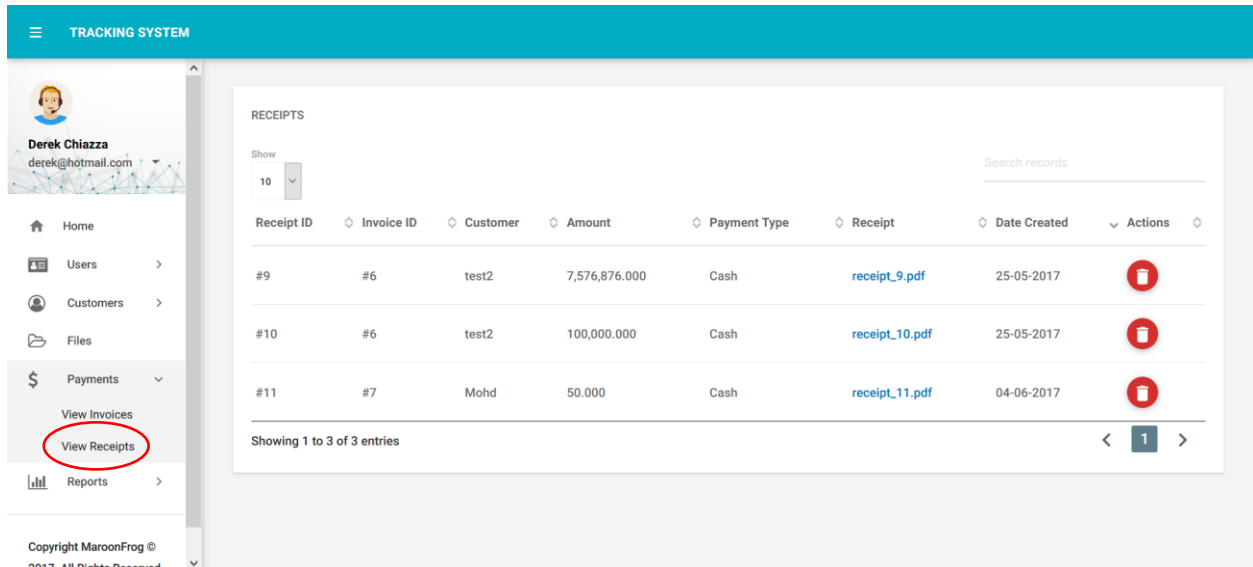


FIGURE 61 - VIEW RECEIPTS

- Delete Receipt

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

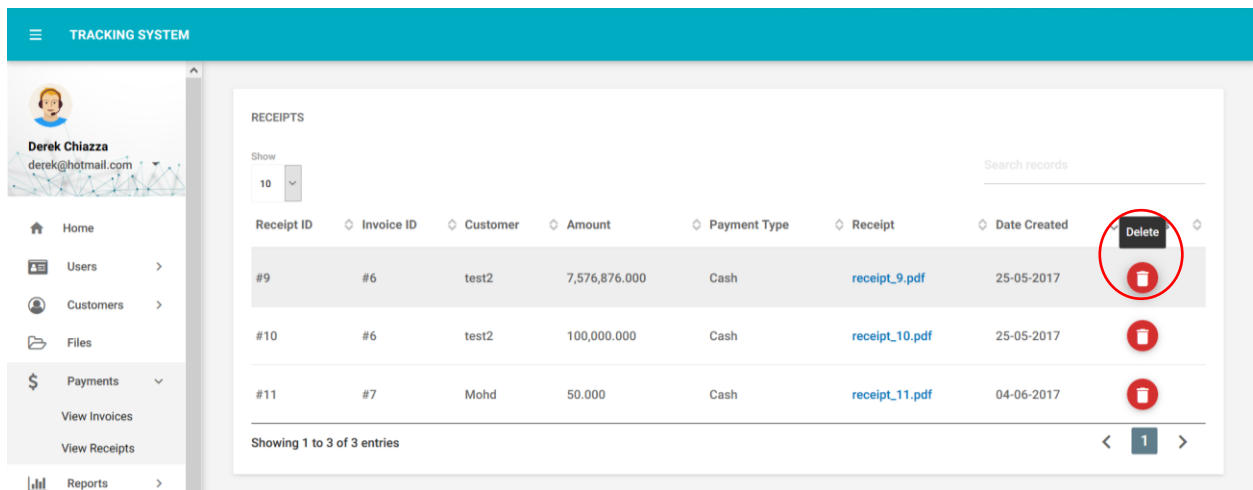


FIGURE 62 - DELETE RECEIPT 1

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.

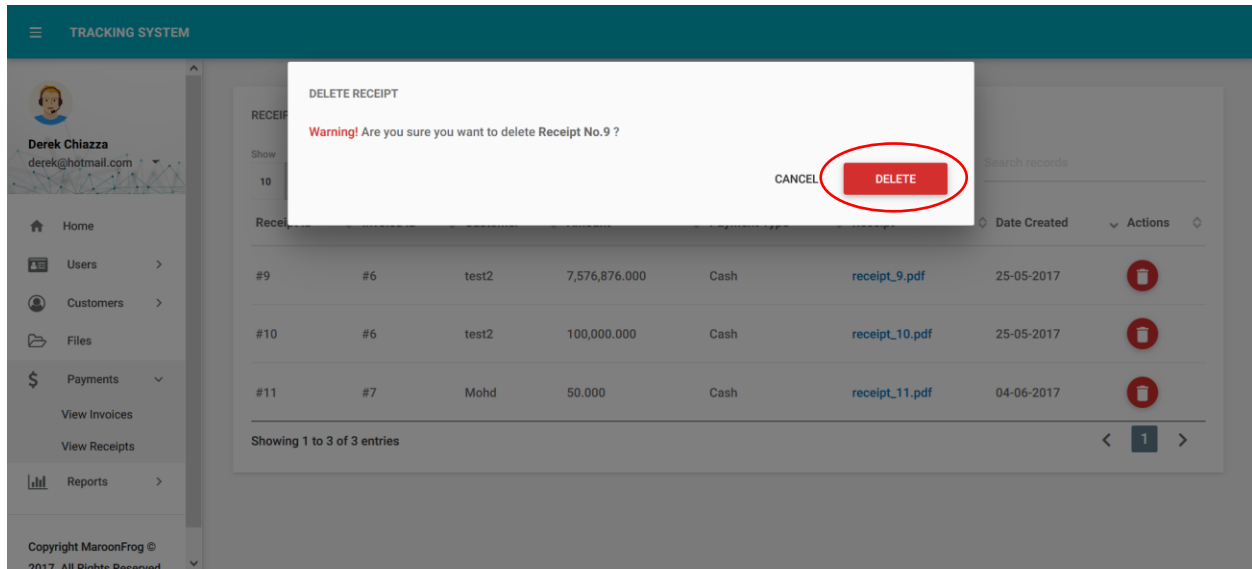


FIGURE 63 - DELETE RECEIPT 2

## 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.

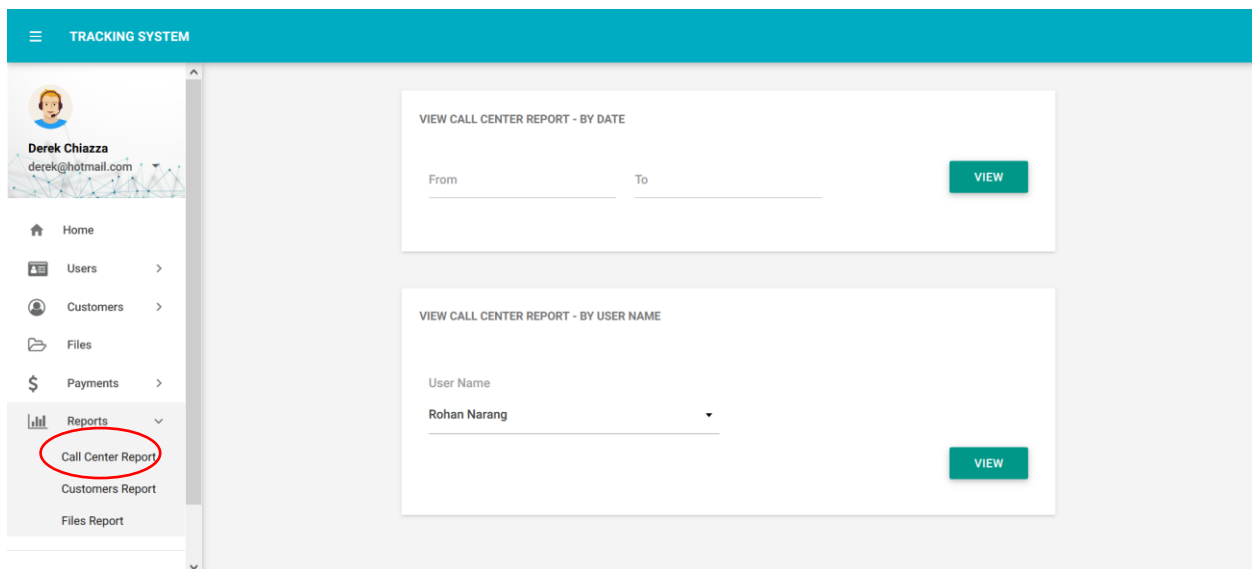


FIGURE 64 - CALL CENTER REPORT 1

- 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.

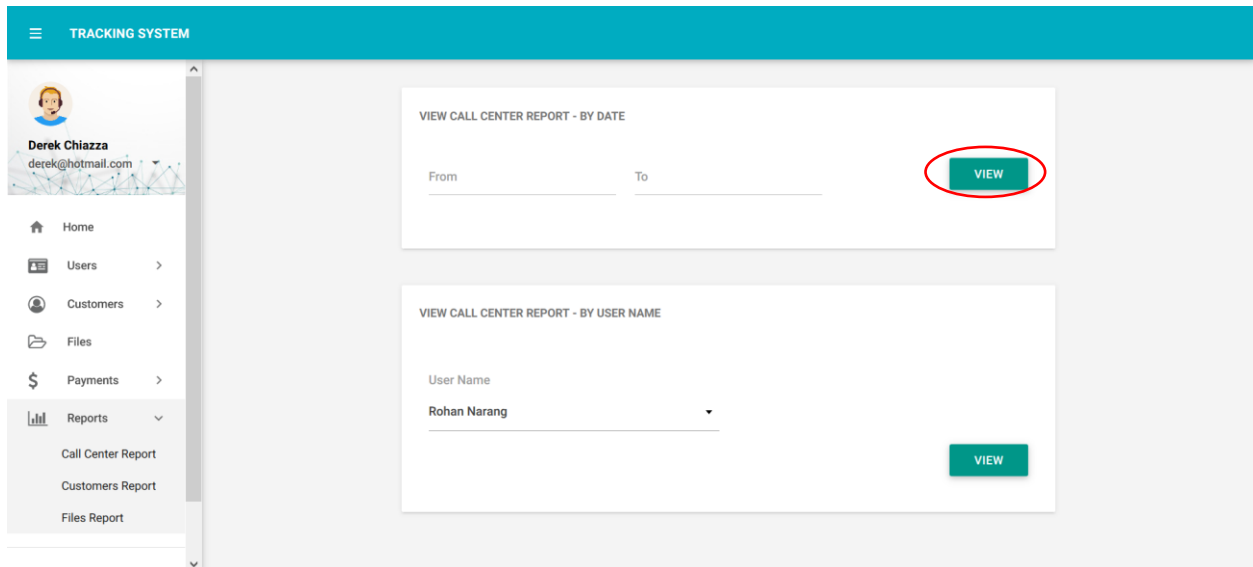


FIGURE 65 - CALL CENTER REPORT - VIEW BY DATE 1

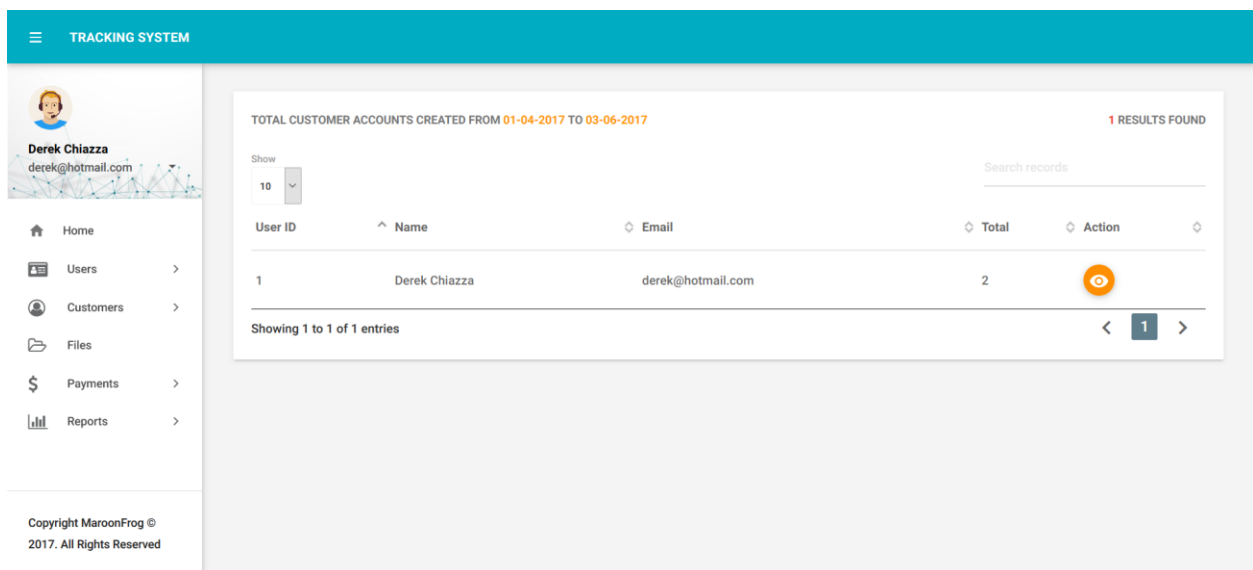
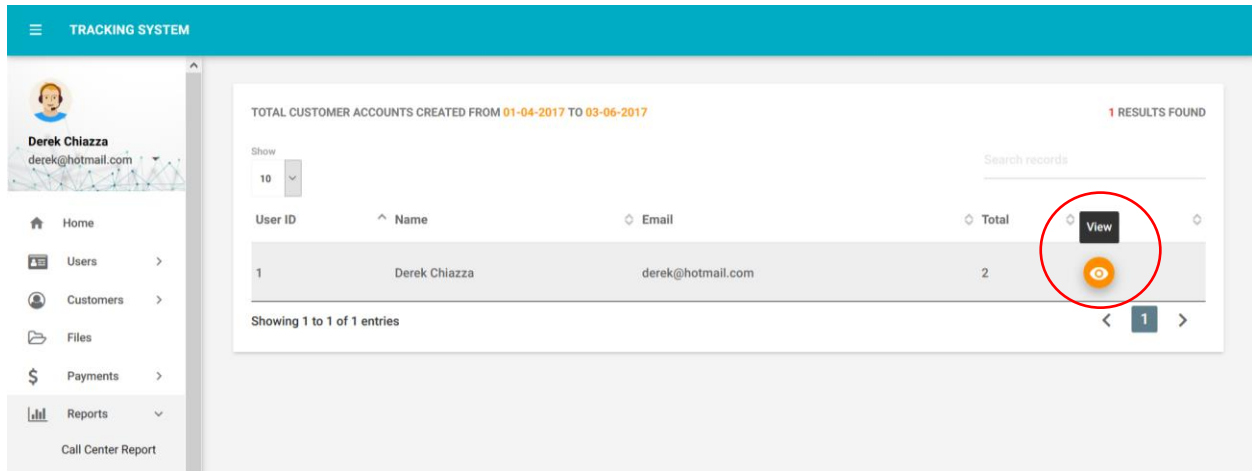


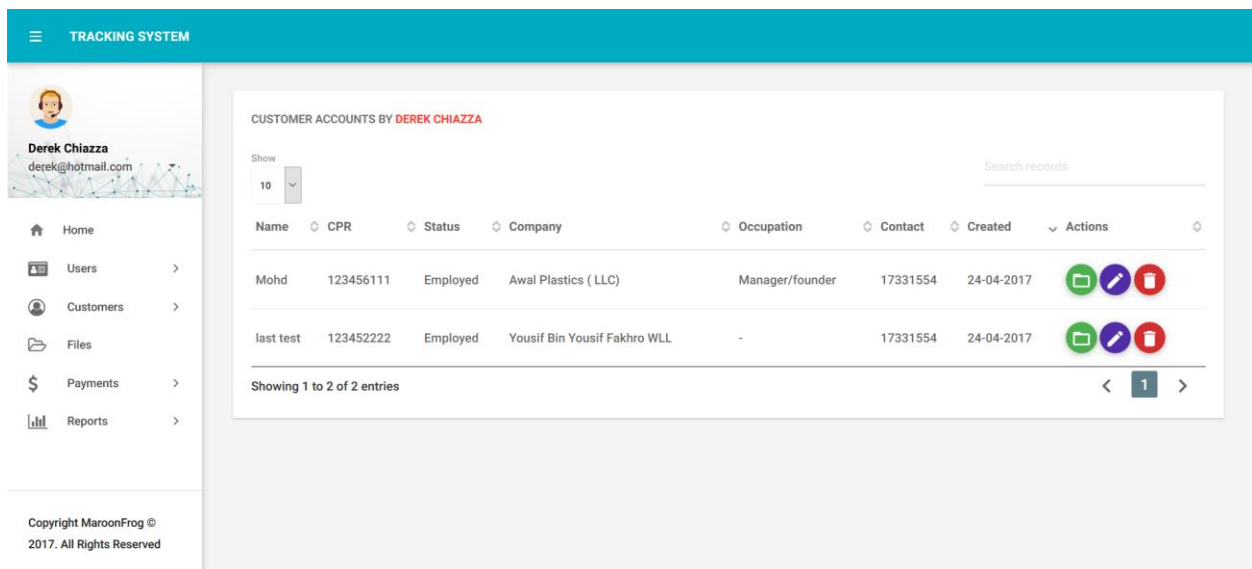
FIGURE 66 - CALL CENTER REPORT - VIEW BY DATE 2

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**

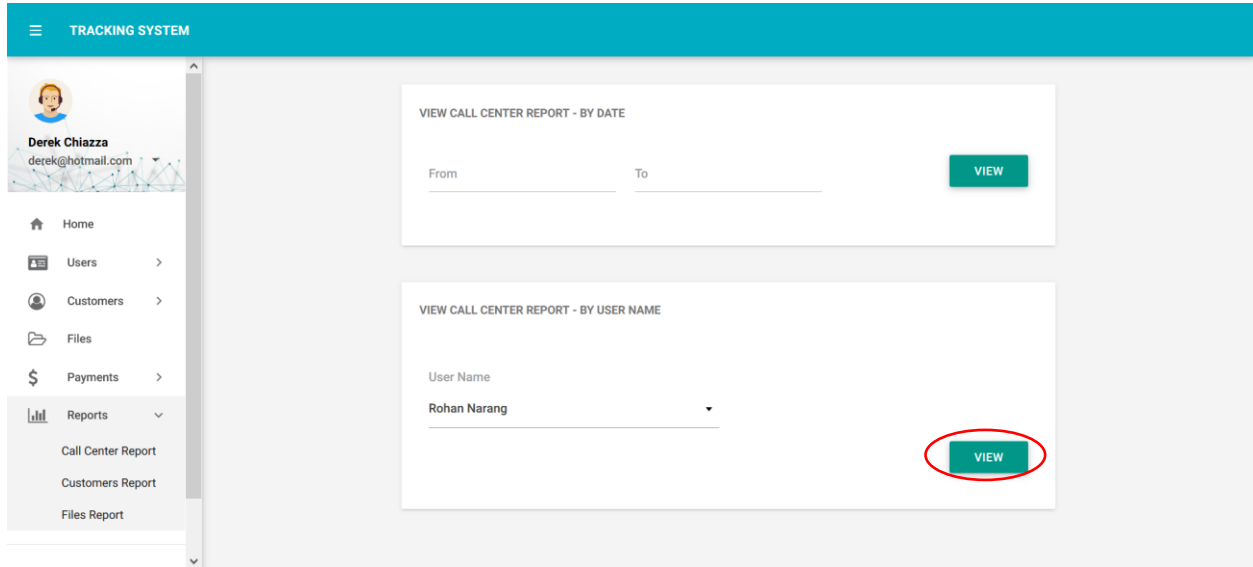
A list will appear showing the customers created by the user, as shown in Figure 68.



**FIGURE 68 - CALL CENTER REPORT- VIEW BY DATE 4**

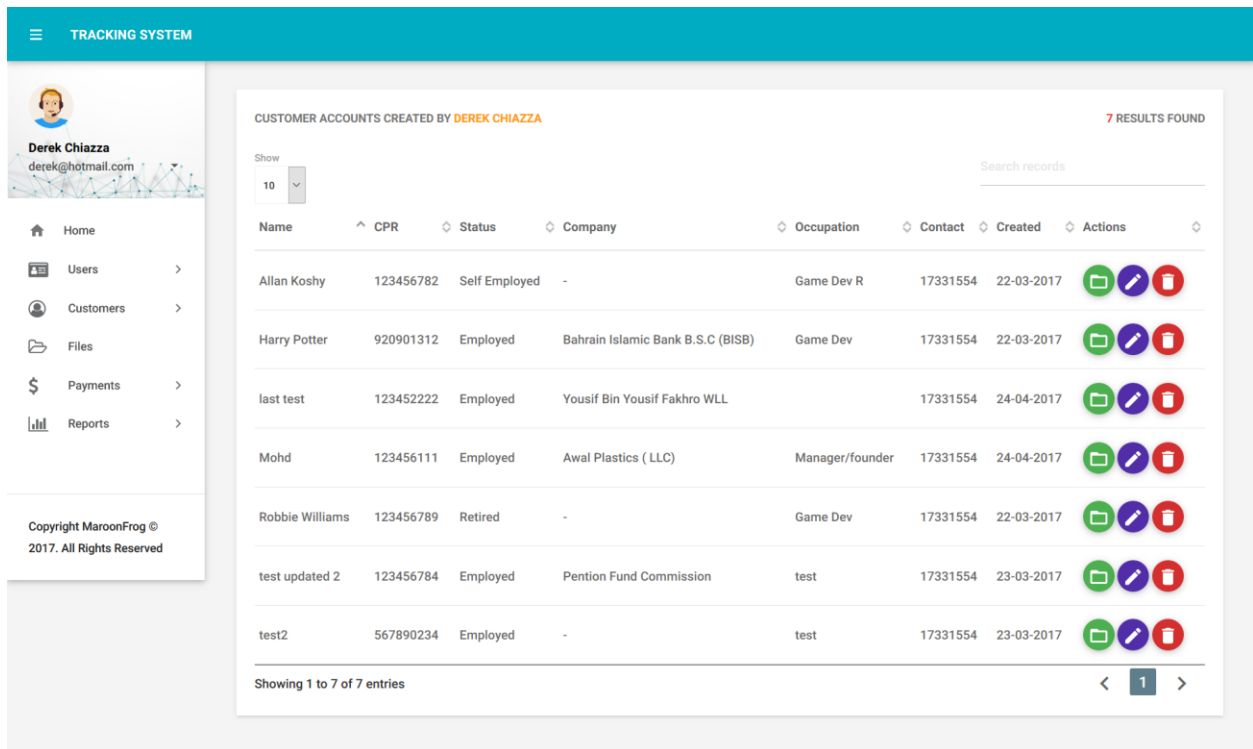
**2. View Report by User Name**

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**

## ▪ 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.

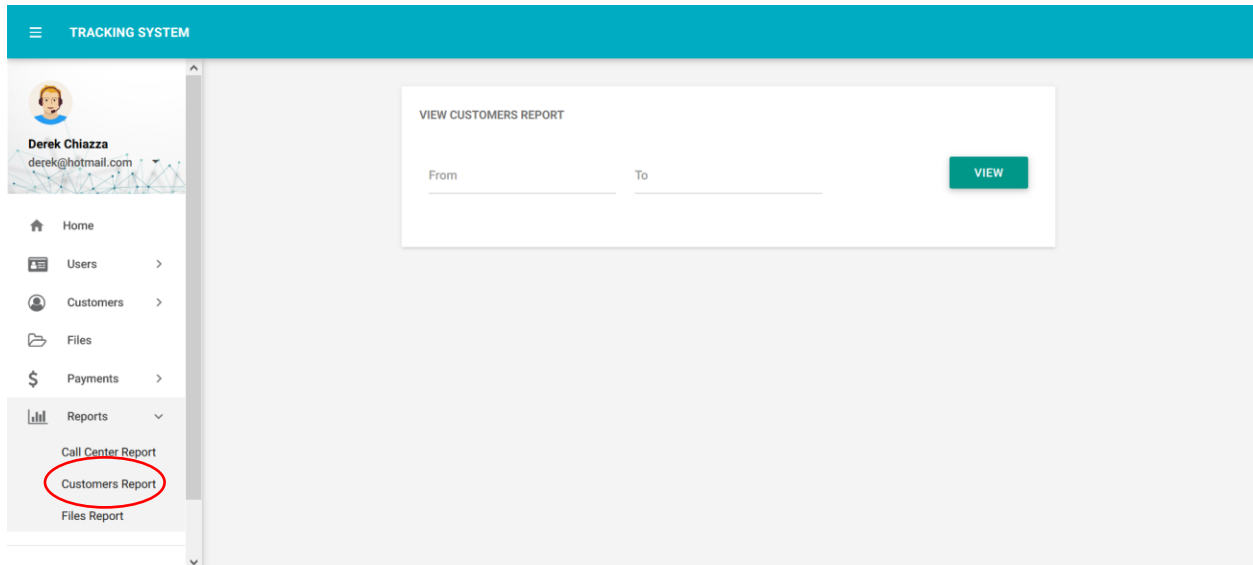


FIGURE 71 - CUSTOMER REPORT 1

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

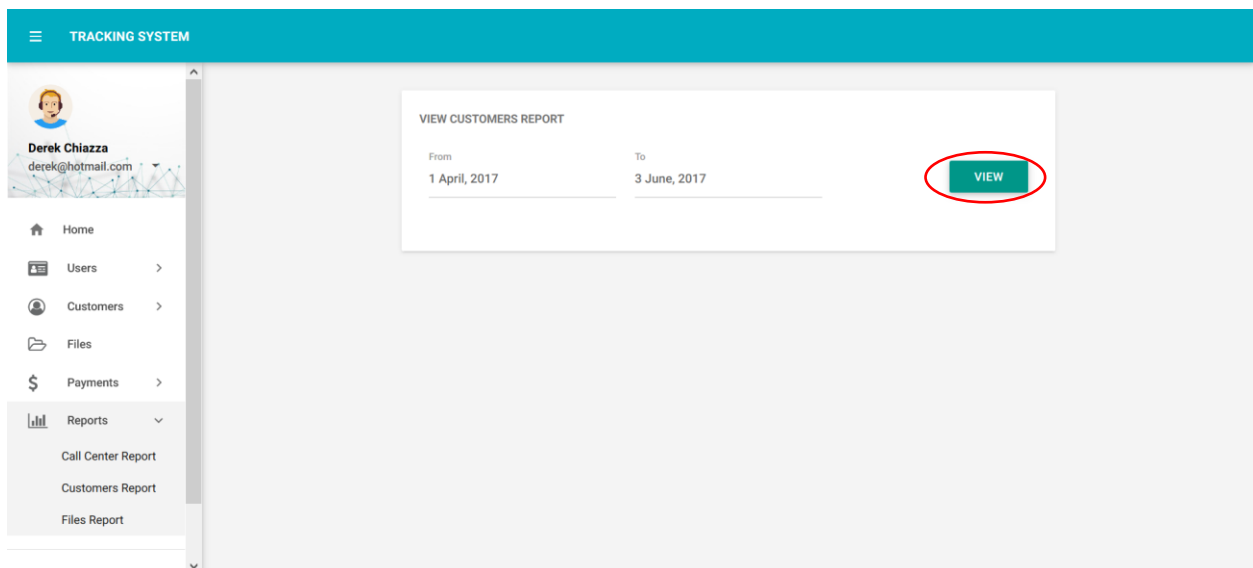


FIGURE 72 - CUSTOMER REPORT 2

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

The screenshot shows the MaroonFrog Tracking System interface. The main content area displays a report titled "CUSTOMER ACCOUNTS CREATED FROM 01-04-2017 TO 03-06-2017" with "2 RESULTS FOUND". The report includes a table with the following data:

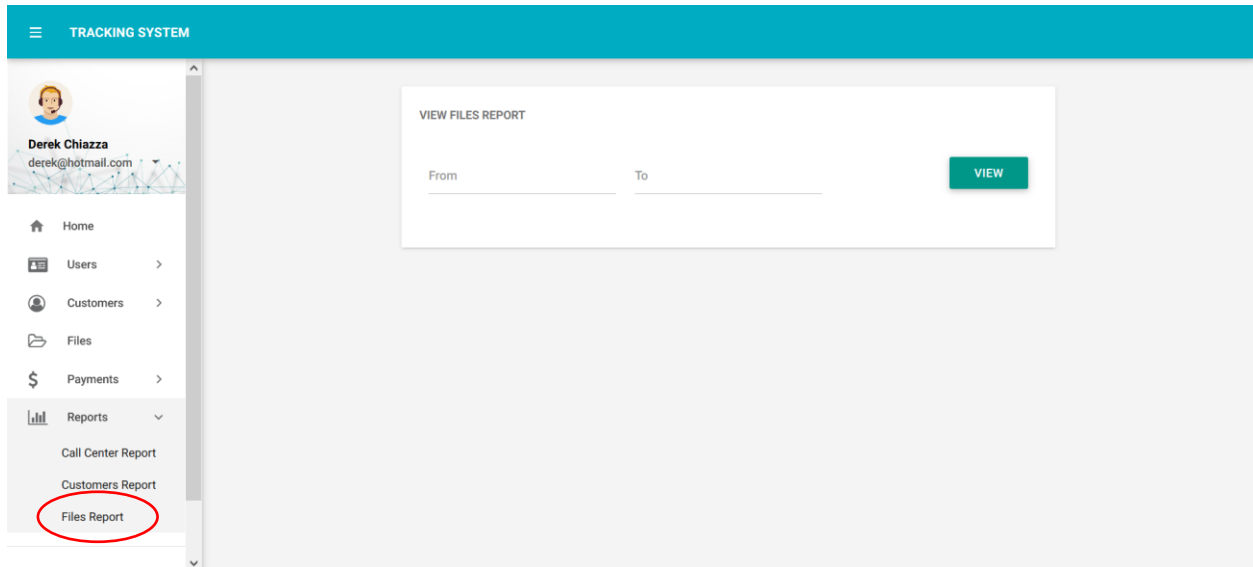
Name	CPR	Status	Company	Occupation	Contact	Created
last test	123452222	Employed	Yousif Bin Yousif Fakhro WLL		17331554	24-04-2017
Mohd	123456111	Employed	Awal Plastics ( LLC)	Manager/founder	17331554	24-04-2017

The interface also shows a sidebar menu with options: Home, Users, Customers, Files, Payments, and Reports. The user profile for Derek Chiazza is visible at the top left. The footer indicates "Copyright MaroonFrog © 2017. All Rights Reserved".

**FIGURE 73 - CUSTOMER REPORT 3**

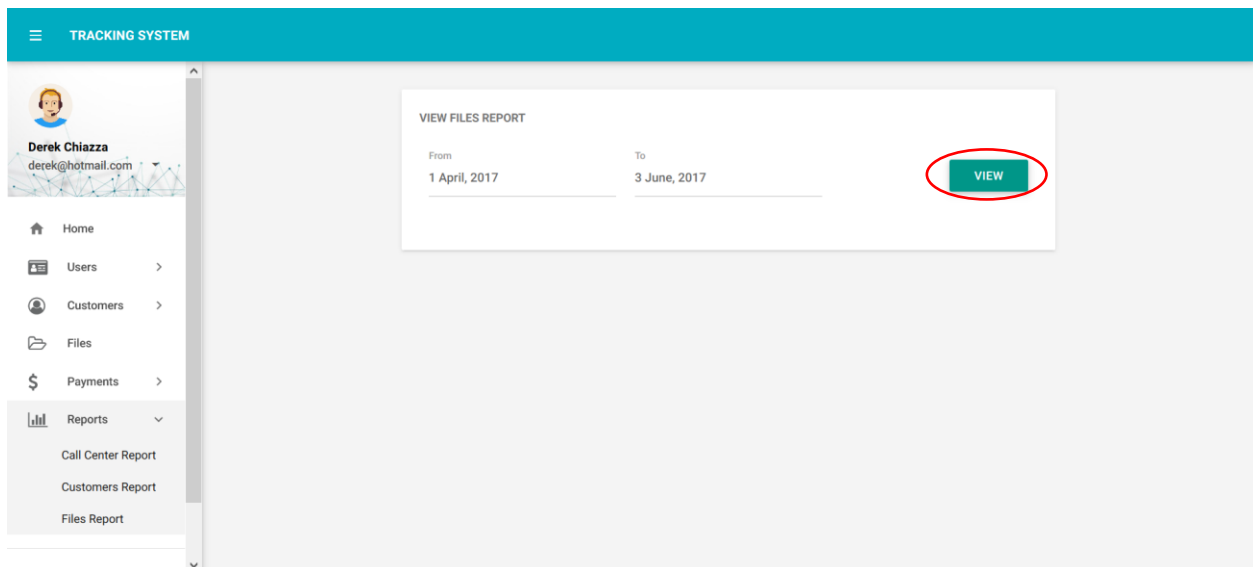
- **Files Report**

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 selecting 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.

☰ TRACKING SYSTEM



**Derek Chiazza**  
derek@hotmail.com

- [Home](#)
- [Users](#) >
- [Customers](#) >
- [Files](#)
- [Payments](#) >
- [Reports](#) >

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FILES CREATED FROM 01-04-2017 TO 03-06-2017
18 RESULTS FOUND

Show 
Search records

File ID	Name	CPR	Loan Type	Status	Created
1	Allan Koshy	123456782	Mortgage loan	Missing document	06-04-2017
2	Isa Jaffar	920901313	Personal loan	Approved by Bank	06-04-2017
3	Harry Potter	920901312	Personal loan	Closed	06-04-2017
4	Isa Jaffar	920901313	Personal loan	Initiated/Created	06-04-2017
9	Robbie Williams	123456789	Personal loan	Initiated/Created	09-04-2017
10	test updated 2	123456784	Personal loan	Initiated/Created	09-04-2017
12	Rohan Narang	920901310	Personal loan	Initiated/Created	12-04-2017
14	Robbie Williams	123456789	Personal loan	Missing document	12-04-2017
15	Rohan Narang	920901310	Commercial loan	Initiated/Created	13-04-2017
16	Robbie Williams	123456789	Personal loan	Initiated/Created	13-04-2017

Showing 1 to 10 of 18 entries

 < **1** 2 >

**FIGURE 76 - FILES REPORT 3**