LALCO STAFF APP

LALCO Staff App is a mobile application designed for LALCO employees to manage their daily work activities efficiently. It allows staff to access important information, manage assigned tasks, and update work-related data directly from their smartphones. The app helps employees stay connected with company systems anytime and anywhere, improving productivity and communication.

Introduction

What is LALCO Staff App?

Brief overview of the app

LALCO Staff App is a mobile application designed for LALCO employees to manage their daily work activities efficiently. It allows staff to access important information, manage assigned tasks, and update work-related data directly from their smartphones. The app helps employees stay connected with company systems anytime and anywhere, improving productivity and communication.

Key features at a glance

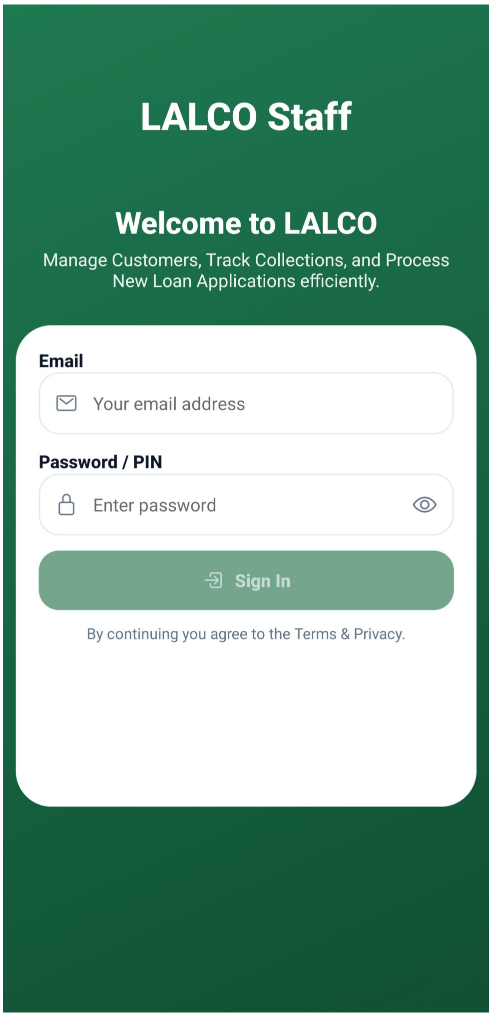
- Task management and tracking
- View and update contract details
- Customer information access
- Sales activity updates
- Real-time notifications and alerts
- Secure staff login

Who should use this app

This app is for:

- LALCO sales staff
- Field officers and operational staff
- Company employees who manage customer contracts
- Staff who need to access company systems remotely

Login Screen



The **Login Screen** allows authorized staff members to access the **LALCO Staff application**. From here, employees can log in to manage customers, track collections, and process loan applications.

Screen Fields

Email Address

Users must enter their **registered company email address**.

Example:

staff@lalco.la

This email must be provided by the **system administrator**.

Password / PIN

Users must enter their **secure password** associated with their account.

Security features:

- Password is hidden by default.
- The **eye icon** can be used to show or hide the password.

Sign In Button

After entering valid credentials, press **Sign In** to access the system.

If login is successful, the system will open the **dashboard**.

Terms & Privacy

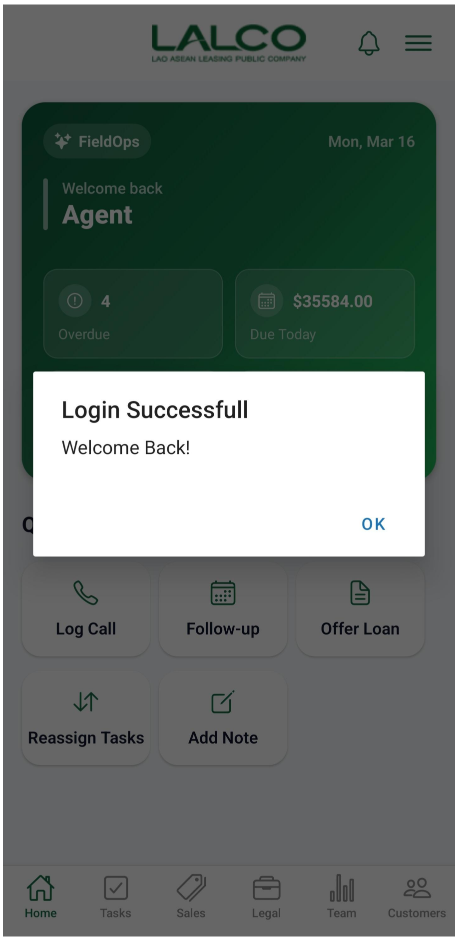
At the bottom of the screen, users will see the message:

By continuing you agree to the Terms & Privacy

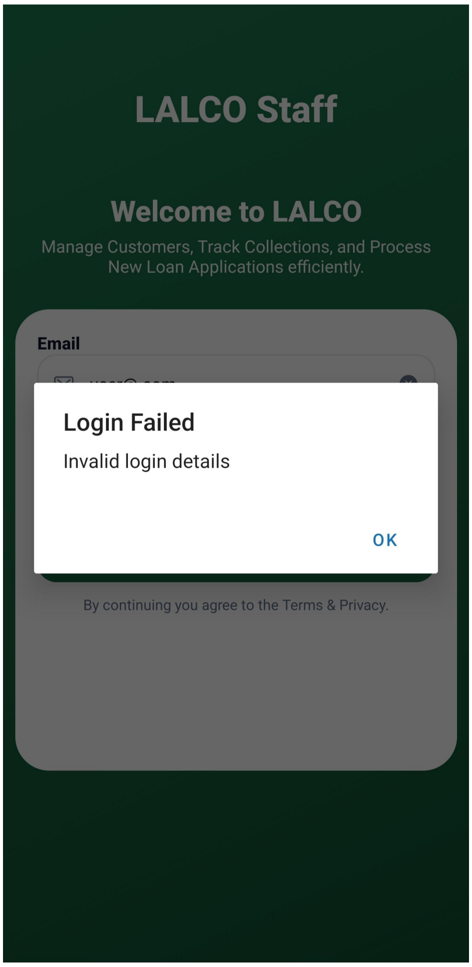
This indicates that by logging in, the user agrees to the company's usage policies.

How to Log In

1. Open the **LALCO Staff** application.
2. Enter your **email address**.
3. Enter your **password**.
4. Tap **Sign In**.
5. You will be redirected to the **main dashboard**.


LALCO
LAO ASEAN LEASING PUBLIC COMPANY
FieldOps
Mon, Mar 16
Welcome back
Agent
4
Overdue
$35584.00
Due Today
Login Successfull
Welcome Back!
OK
Log Call
Follow-up
Offer Loan
Reassign Tasks
Add Note
Home
Tasks
Sales
Legal
Team
Customers

Common Login Issues



Incorrect Password

If the password is incorrect:

- Check if **Caps Lock** is enabled.
- Re-enter the password carefully.

Invalid Email

Make sure you are using your **official company email**.

Example:

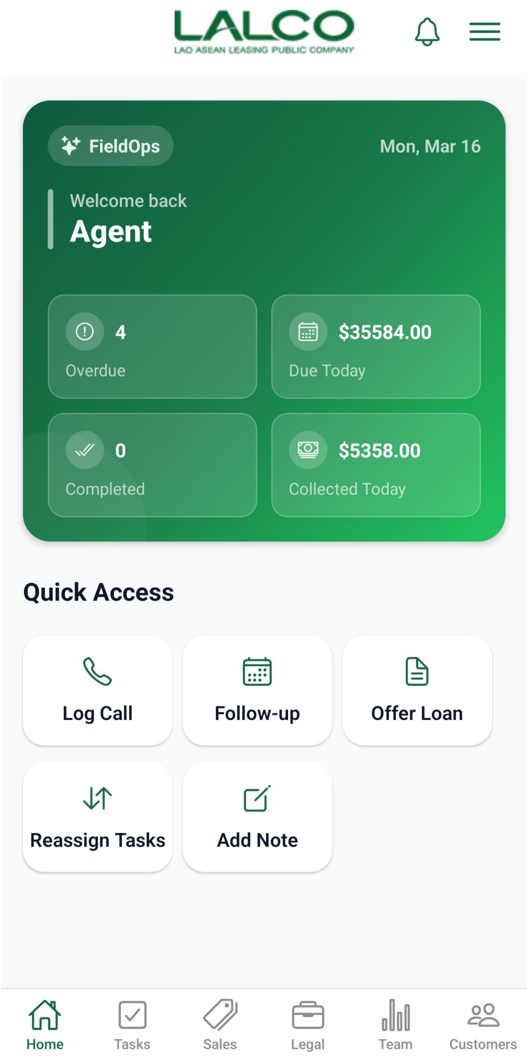
username@lalco.la

Security Guidelines

- Do **not share your login credentials**.
- Always **log out when using a shared device**.

Change your password regularly.

Home Screen



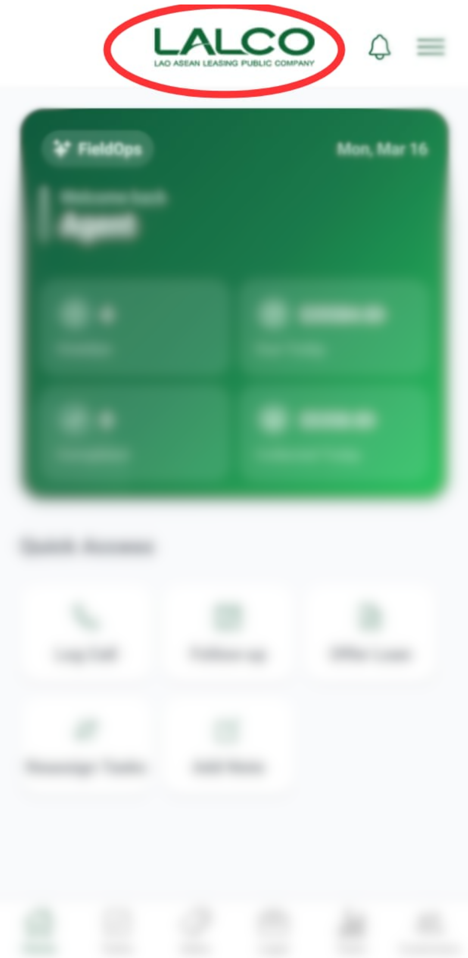
The **Home Screen** is the main screen of the **LALCO Staff** application. It provides agents with a quick overview of their daily tasks, collections, and customer activities.

From this screen, staff members can quickly access important features such as logging calls, scheduling follow-ups, offering loans, and managing tasks.

Header Section

1.Company Logo

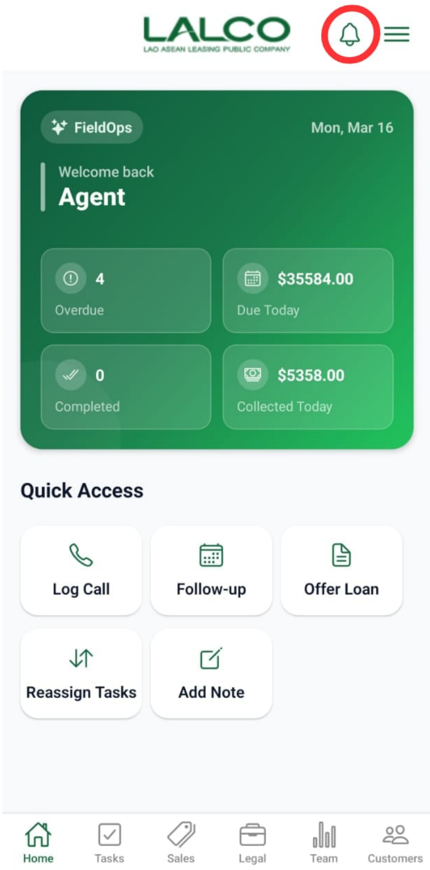
The **LALCO logo** at the top represents the company and confirms that the user is logged into the official staff application.



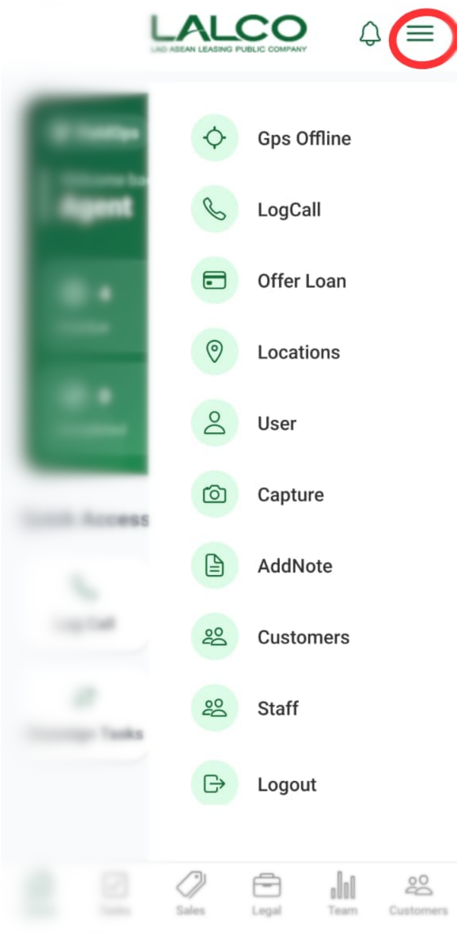
2.Notification Icon

The **bell icon** shows notifications such as:

- New assigned tasks
- Follow-up reminders
- Customer updates
- System alerts


LALCO
LAO ASEAN LEASING PUBLIC COMPANY
FieldOps
Mon, Mar 16
Welcome back
Agent
4
Overdue
$35584.00
Due Today
0
Completed
$5358.00
Collected Today
Quick Access
Log Call
Follow-up
Offer Loan
Reassign Tasks
Add Note
Home
Tasks
Sales
Legal
Team
Customers

3.Menu Icon ☰



The **Menu icon** (☰), located at the top-right corner of the screen, opens the **side navigation panel**. This panel provides quick access to additional features and system functions.

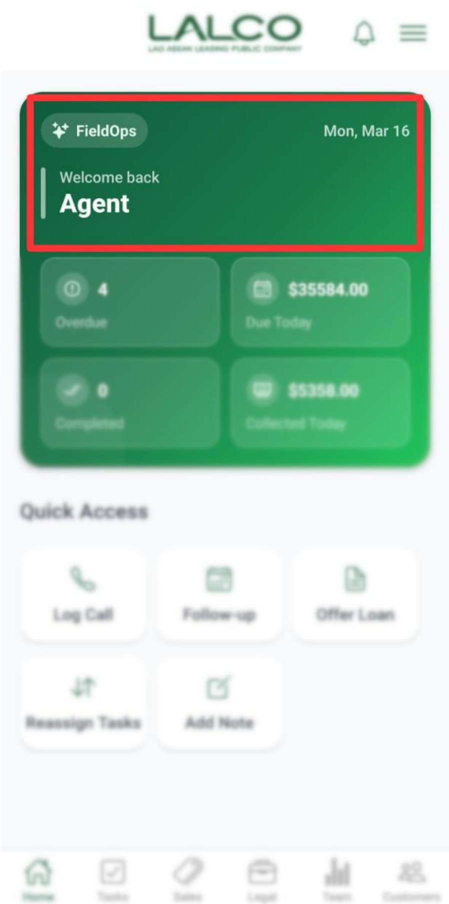
When tapped, a sidebar appears with the following options:

Menu Options

- **GPS Offline**
  Indicates the current GPS status. This helps agents know whether location tracking is active or not.
- **Log Call**
  Quickly navigate to the call logging screen to record customer interactions.
- **Offer Loan**
  Access the loan offering feature to create or manage loan proposals.
- **Locations**
  View or manage location-related data (useful for field agents).
- **User**
  Access user profile information and settings.
- **Capture**
  Open the camera or capture feature to upload images or documents.

- **Add Note**
  Create and save notes related to customers or tasks.
- **Customers**
  Navigate to the customer management section.
- **Staff**
  View or manage staff-related information.
- **Logout**
  Securely log out of the application.

Agent Overview Panel



This section shows a quick summary of the agent's daily activity.

4.FieldOps Badge

Indicates the user is operating in **Field Operations mode**.

5.Welcome Message

Displays the logged-in staff member’s role or name.

Example:

Welcome back Agent

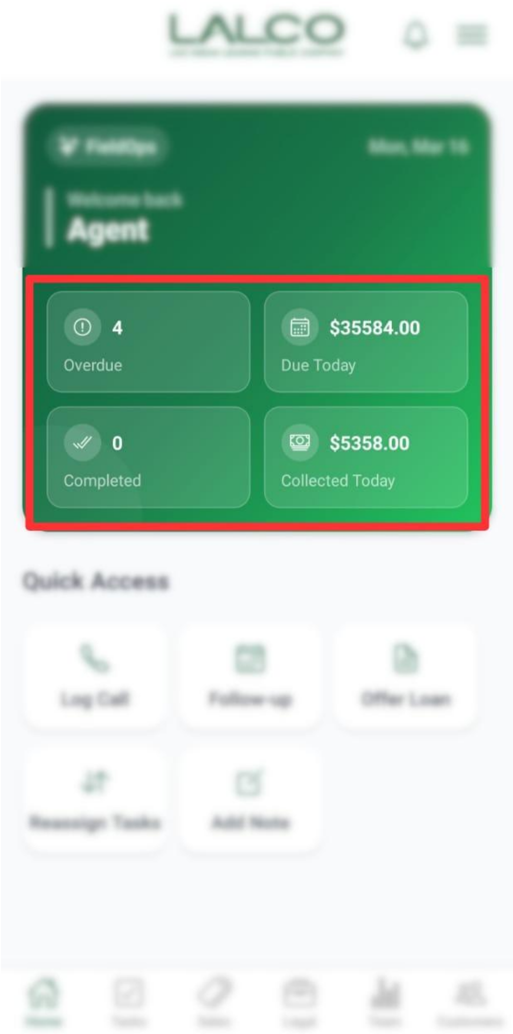
6.Current Date

Shows the **current working date** for reference.

Example:

Mon, Mar 16

Activity Summary Cards



These cards show important performance indicators for the day.

7.Overdue

Displays the number of **customers with overdue payments**.

Example:

4 Overdue

This helps agents prioritize collections.

8.Due Today

Shows the **total amount that needs to be collected today**.

Example:

$35584.00

9.Completed

Displays the number of **completed tasks or collections for the day**.

Example:

0 Completed

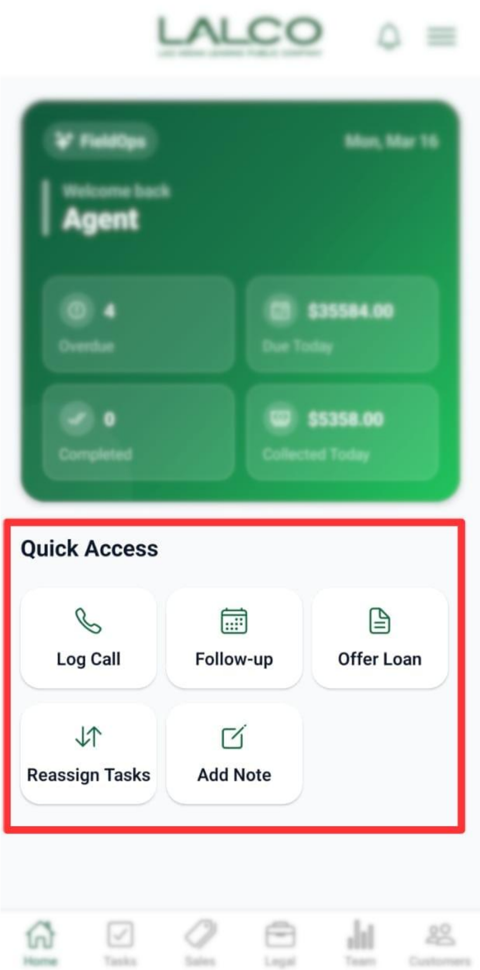
10.Collected Today

Shows the **total amount successfully collected today**.

Example:

$5358.00

Quick Access Section



The **Quick Access** panel provides shortcuts to frequently used actions.

11.Log Call

Allows agents to record details after contacting a customer.

Information that can be logged:

- Call result
- Customer response
- Payment commitment

12.Follow-up

Used to schedule a **future reminder to contact a customer again**.

Agents can set:

- Follow-up date

- Follow-up notes

13.Offer Loan

Allows staff to create or propose **new loan offers to customers**.

This is typically used when:

- A customer requests a loan
- A new sales opportunity is identified

14.Reassign Tasks

Allows agents or supervisors to **transfer tasks to another staff member**.

Used when:

- The assigned agent is unavailable
- Tasks need redistribution

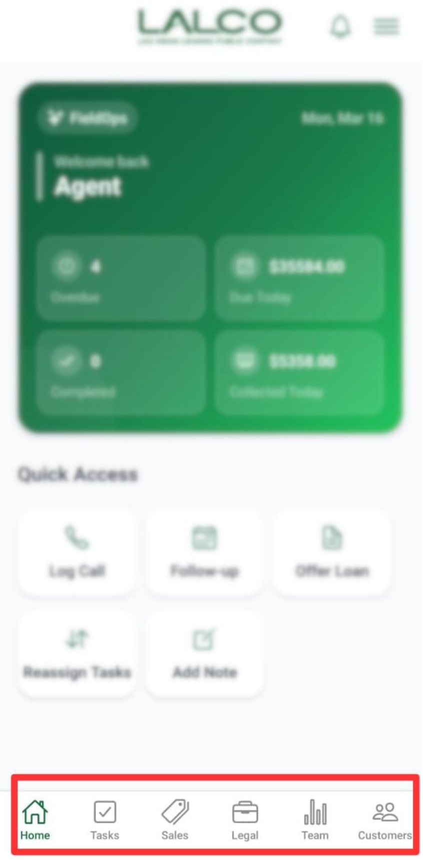
15.Add Note

Agents can record **internal notes about customers or cases**.

Notes may include:

- Customer discussions
- Payment promises
- Special instructions

Bottom Navigation Menu



The bottom navigation bar allows users to move between main sections of the application.

16.Home

Returns to the **Dashboard screen**.

17.Tasks

Shows all assigned **tasks and pending activities**.

18.Sales

Used to manage **loan sales and offers**.

19.Legal

Displays cases that require **legal action or documentation**.

20.Team

Shows team members and allows **team coordination**.

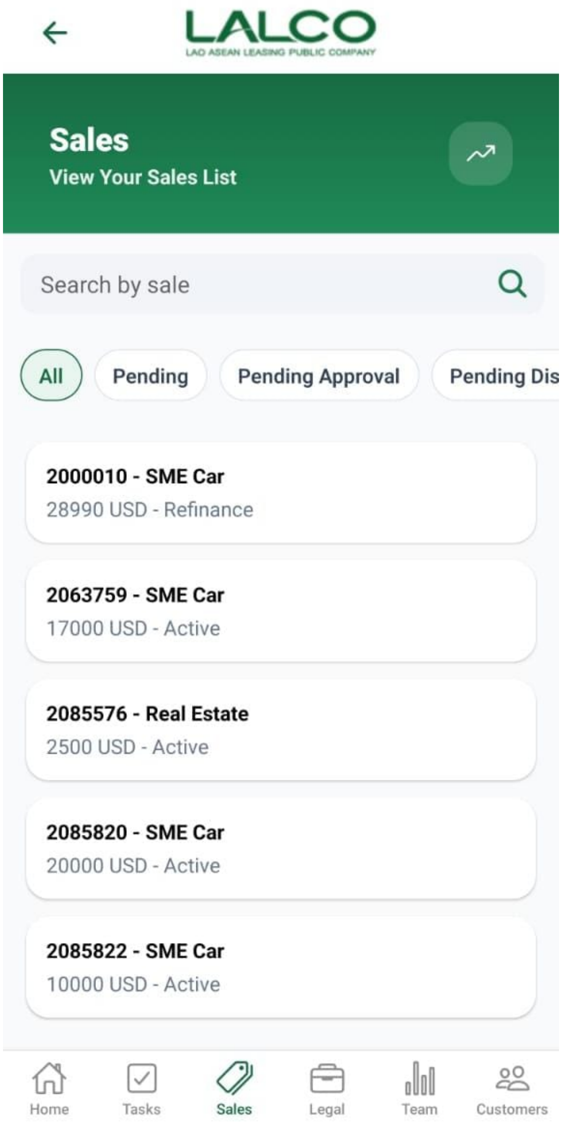
21.Customers

Provides access to the **customer database**.

Agents can:

- Search customers
- View loan details
- Update records

Sales Screen



The **Sales Screen** allows staff to view and manage all loan sales within the system. It provides a searchable and filterable list of sales records, helping agents track loan statuses and customer applications efficiently.

Header Section

Page Title

Sales

Indicates that the user is viewing the list of all sales records.

Description

View Your Sales List

Provides a quick explanation of the screen’s purpose.

Action Icon □□

The icon on the right may be used to:

- View **sales analytics**
- Access **reports or performance insights**

Search Function

Search Bar

Search by sale

Allows users to search sales by:

- Sale ID

- Product type (e.g., SME Car, Real Estate)
- Customer-related data

Filter Options

Users can filter sales based on their status:

- **All** → Shows all sales records
- **Pending** → Sales that are not yet processed
- **Pending Approval** → Awaiting approval from management
- **Pending Disbursement** (if available) → Approved but not yet released
- **Disbursement Approval** → Loan is approved and waiting for final disbursement authorization before funds are released
- **Active** → Loan is currently active
- **Cancelled** → Loan has been cancelled and is no longer valid
- **Refinance** → Loan has been refinanced or restructured
- **Closed** → Loan has been fully completed and closed
- **Active Pending** → Loan is active but has pending actions
- **Checking To Close** → Loan is under review for closure
- **Active / Refinanced / Closed** → Used to group multiple statuses for filtering

□□ Helps users quickly find specific types of sales.

Sales List

Each item in the list represents a **sale record**.

Example:

2000010 - SME Car
28990 USD - Refinance

Information Displayed

Each sales item shows:

- **Sale ID** (e.g., 2000010)
- **Loan/Product Type** (e.g., SME Car, Real Estate)
- **Loan Amount** (e.g., 28990 USD)
- **Status** (e.g., Active, Refinance)

Status Types

Common statuses include:

- **Active** → Loan is currently active
- **Refinance** → Loan has been refinanced
- **Pending** → Waiting for processing
- **Pending Approval** → Waiting for approval

How to Use

View a Sale

1. Open the **Sales** tab.
2. Browse or search for a sale.
3. Tap on a record to view full details.

Search for a Sale

1. Tap on the search bar.

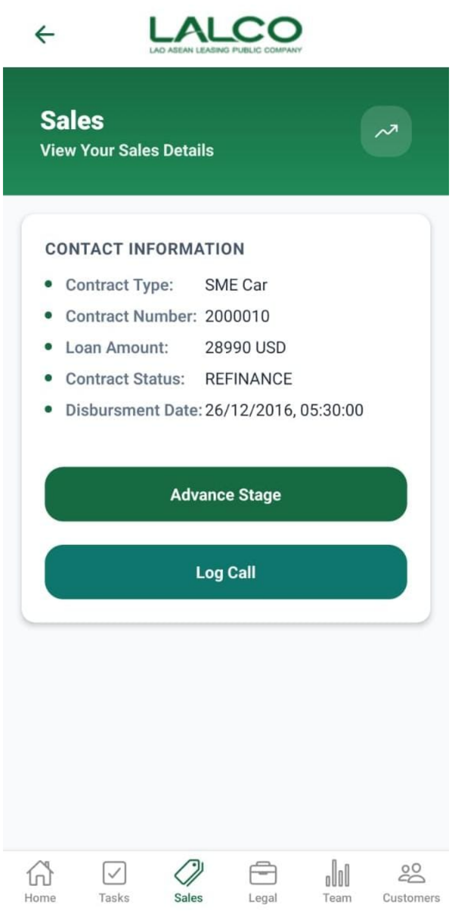
2. Enter Sale ID or keyword.
3. Results will filter automatically.

Filter Sales

1. Tap on a filter (e.g., *Pending*).
2. The list updates based on selection.

□Tip:
Use filters + search together to quickly find specific sales records.

Sales Details Screen



The **Sales Details Screen** provides detailed information about a selected sale or loan contract. It allows staff to review contract details and take actions such as progressing the sale or logging customer interactions.

Header Section

Page Title

Sales

Indicates the user is viewing detailed information of a specific sale.

Description

View Your Sales Details

Explains the purpose of this screen.

Back Button ←

Allows users to return to the **Sales List Screen**.

Action Icon

May be used to view:

- Sales performance
- Reports or analytics related to the selected contract

Contact Information Section

This section displays key details of the selected sale/contract.

Contract Type

Example:

SME Car

Indicates the type of loan or product.

Contract Number

Example:

2000010

A unique identifier for the sale.

Loan Amount

Example:

28990 USD

Displays the total loan value.

Contract Status

Example:

REFINANCE

Shows the current state of the contract.

Common statuses:

- Active
- Refinance
- Pending
- Closed

Disbursement Date

Example:

26/12/2016, 05:30:00

Indicates when the loan amount was released.

Action Buttons

Advance Stage

Allows staff to move the sale to the **next stage in the workflow**.

Used when:

- Processing the loan forward
- Updating the contract status

Log Call

Opens the **call logging feature** to record communication with the customer.

Useful for:

- Tracking follow-ups
- Recording customer discussions
- Logging payment commitments

How to Use

View Sale Details

1. Open the **Sales** tab.
2. Select a sale from the list.
3. Review all contract details.

Advance a Sale

1. Tap **Advance Stage**.
2. Confirm or update the next stage.
3. Save changes.

Log a Call

1. Tap **Log Call**.
2. Enter call details.
3. Save the record.

Bottom Navigation

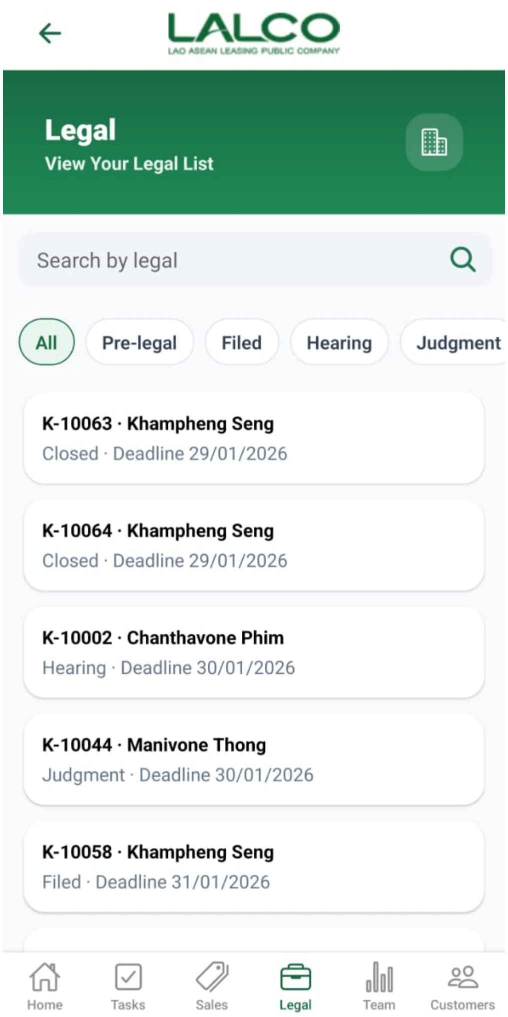
The **Sales tab** remains highlighted, indicating the current section.

Other tabs:

- Home
- Tasks
- Legal
- Team
- Customers

Tip:
Always review contract details before advancing stages to avoid errors.

Legal Screen



The **Legal Screen** allows staff to view and manage all legal cases related to customers and contracts. It provides a searchable and filterable list of legal records.

Header Section

Page Title

Legal

Description

Search Function

Search Bar

Search by legal

Allows users to search by:

- Contract number
- Customer name

Filter Options

Users can filter legal cases by stage:

- **All** → Shows all cases
- **Pre-legal** → Before legal action starts
- **Filed** → Case has been filed
- **Hearing** → Under court hearing
- **Judgment** → Final decision stage
- **Closed** → Finished cases

Legal List

Each item represents a legal case.

Example:

K-10063 – Khampheng Seng
Closed · Deadline 29/01/2026

Information Displayed

Each record shows:

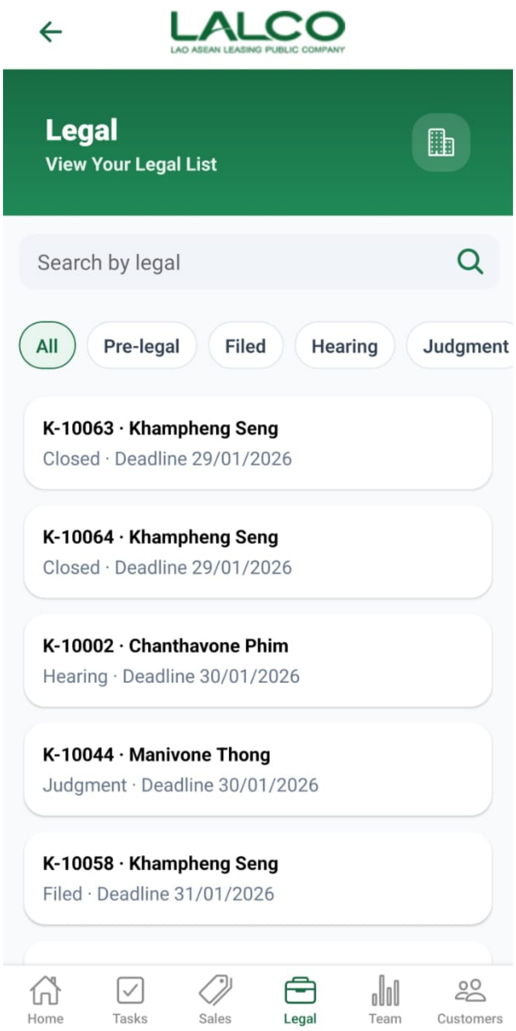
- **Contract Number**
- **Customer Name**
- **Stage**
- **Deadline**

How to Use

View a Case

1. Open the **Legal tab**
2. Browse or search cases
3. Tap a case to view details

LALCO Staff App – Legal Details Screen



The **Legal Details Screen** shows detailed information about a selected legal case and allows staff to take actions.

Legal Details Section

Displays key information:

- **Name** → Customer name
- **Contract Number** → Unique ID
- **Stage** → Current legal status
- **Deadline** → Important due date

Actions

Start Visit

Used to begin a field visit related to the case.

Used for:

- Customer visits
- Legal follow-ups
- Field verification

How to Use

View Details

1. Select a case from the list
2. Review all details

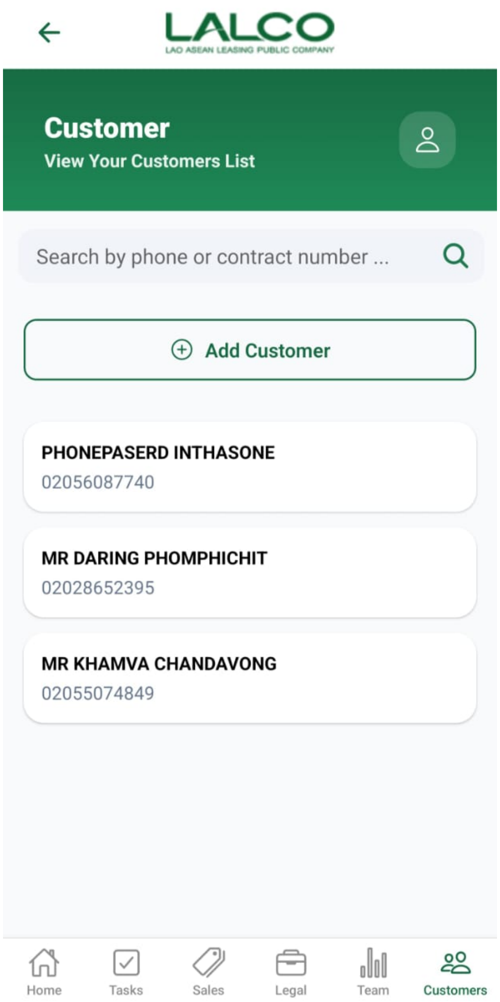
Start Visit

1. Tap **Start Visit**
2. Proceed with visit
3. Update status if needed

Navigation

Legal Screen → Select Case → Legal Details Screen

Customers Screen



The Customers Screen allows staff to view and manage all customers in the system. It provides a searchable list, filter options, and quick access to customer details.

Header Section

Page Title
Customers

Description
View your customer list and manage customer records.

Action Icon ☰
May be used to:

- Access settings
- Open additional options

Search Function

Search Bar
Search by customer

Allows users to search by:

- Customer Name
- Phone Number
- Contract Number

Filter Options

Users can filter customers by status:

- All → Shows all customers
- Active → Currently active customers
- Pending → New or pending approval
- Closed → Completed or closed accounts

Customer List

Each item represents a customer.

Example:

- user – 02056087740 · Closed

Information Displayed
Each record shows:

- Customer Name
- Phone Number
- Status

How to Use

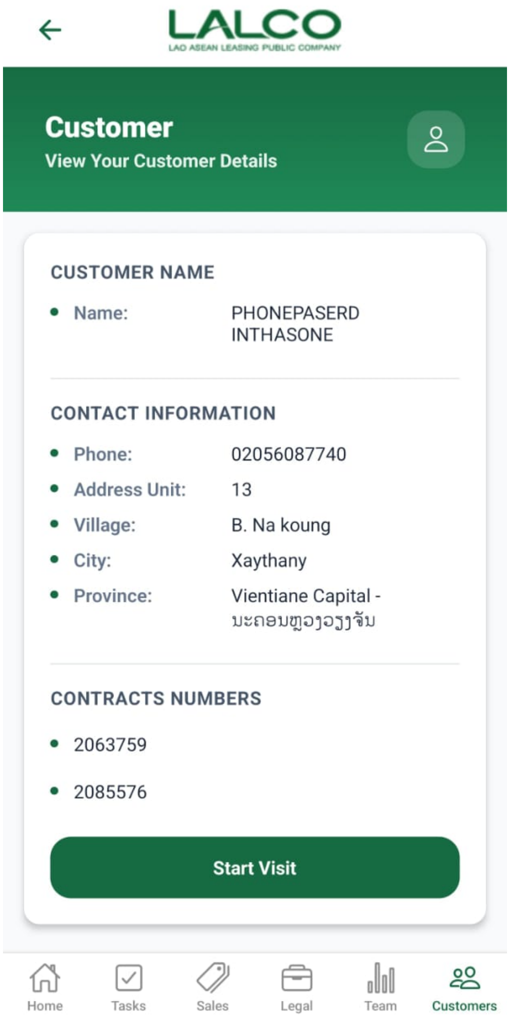
View a Customer

1. Open the Customers tab
2. Browse or search the list
3. Tap a customer to view details

Add a Customer

1. Tap **+ Add Customer**
2. Fill in required fields: Name, Phone, Address, Province → City → Village, NIC/Family Book, Birth Date
3. Tap **Save**

Customer Details Screen



The Customer Details Screen shows detailed information about a selected customer and allows staff to start visits or update records.

Customer Details Section

Displays key information:

- **Name** → Customer Name
- **Phone Number** → Contact number
- **Address** → Unit, Village, City, Province
- **Contract Numbers** → Linked contracts

Actions

Start Visit
Used to begin a field visit related to the customer.

Used for:

- Customer visits
- Payment follow-ups
- Field verification

How to Use

View Details

1. Select a customer from the list
2. Review all details

Start Visit

1. Tap **Start Visit**
2. Proceed with visit
3. Update visit remarks, GPS location, payment status if needed

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Navigation

Customers Screen → Select Customer → Customer Details Screen → Start Visit

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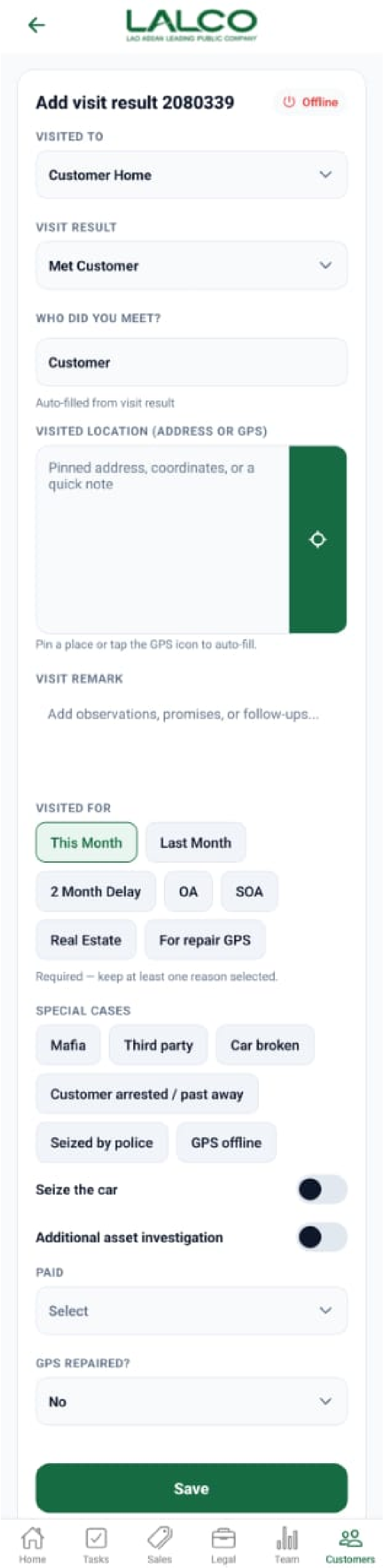
Add Visit Result Screen



The Visit Result Screen allows staff to record the outcome of a customer visit, including visit details, GPS location, remarks, and status updates.

Visit Details Section

Visited To

- Select where the visit occurred (e.g., Customer Home)

Visit Result

- Choose the result of the visit (e.g., Met Customer, Not Available)

Who Did You Meet

- Auto-filled or manually selected

Location Section

Visited Location

- Enter address manually OR
- Tap GPS icon to auto-fill current location

Tip: Always use GPS if possible for accurate tracking

Remarks Section

Visit Remark

- Free text notes about the visit
  (Example: “Customer promised to pay next week”)

Visit Reason Section

Select at least one reason for the visit:

- This Month
- Last Month

- 2 Month Delay
- OA / SOA
- Real Estate
- GPS Repair

Special Cases Section (Optional)

Select only if applicable:

- Third Party
- Car Broken
- Customer Arrested / Passed Away
- Seized by Police
- GPS Offline

Additional Options

- **Seize the Car** → Toggle ON if the vehicle was seized
- **Additional Asset Investigation** → Toggle ON if required

Payment & GPS Status

- **Paid** → Select payment status
- **GPS Repaired** → Yes / No

How to Use

Record Visit

1. Tap **Start Visit** from Customer Details Screen
2. Fill all required fields
3. Add GPS location and remarks
4. Select reasons for visit
5. Update special cases and additional options if needed

6. Tap **Save**

Navigation

Customer Details Screen → Start Visit → Visit Result Screen → Save

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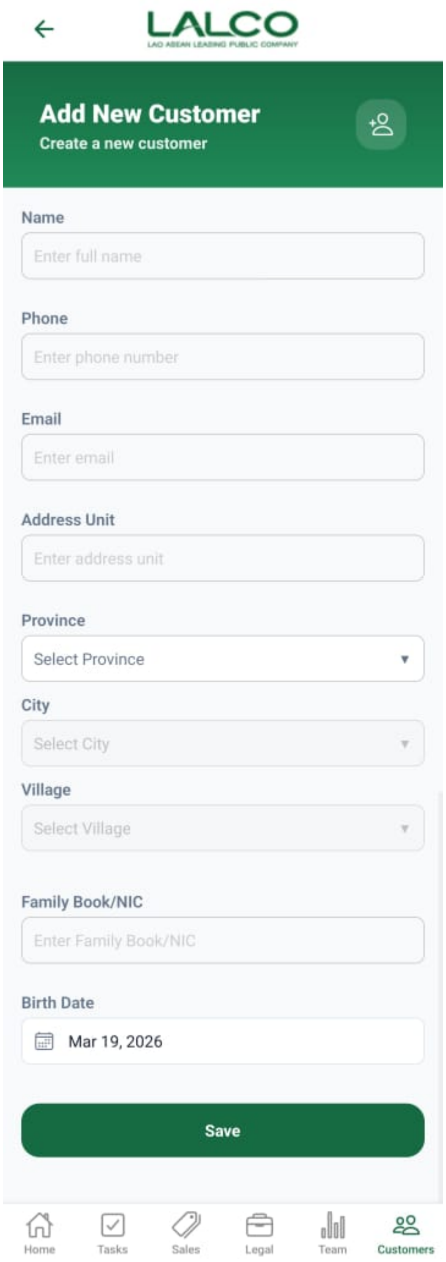
Add New Customer Screen



The **Add New Customer Screen** allows staff to create and register a new customer in the system. This information is used for managing customer records, loans, and follow-up activities.

Header Section

Page Title

Add New Customer

Description

Create a new customer

Customer Information Form

Users must fill in the following details:

Name

Enter the customer’s full name.

Example:

John Silva

Phone

Enter the customer’s contact number.

Example:

0771234567

Email

Enter the customer’s email address (optional if not available).

Example:

john@email.com

Address Unit

Enter the customer’s address or house/unit details.

Province

Select the province from the dropdown list.

City

Select the city based on the chosen province.

Village

Select the village or local area.

Family Book / NIC

Enter the customer’s identification number.

Example:

199812345678

Birth Date

Select the customer’s date of birth using the date picker.

Example:

Mar 19, 2026

Action Button

Save

Tap **Save** to create the new customer.

- If all required fields are filled correctly, the customer will be added successfully.
- If there are missing or invalid details, the system may show an error.

How to Use

Add a New Customer

1. Open the **Customers tab**
2. Tap **Add New Customer**
3. Fill in all required details
4. Tap **Save**
5. Customer will be added to the system

Navigation

Customers → Add New Customer → Save

Team Dashboard Screen

The **Team Dashboard Screen** provides a quick overview of team performance, task distribution, and case analytics. It helps staff monitor daily progress, track workloads, and identify top performers.

Header Section

Date Indicator

Displays the current working day.

Example:

Today / Thu, Mar 19

Page Title

Team Pulse

Shows that this section focuses on **team activity and performance**.

Team Summary Cards

This section provides a quick snapshot of team activity:

- **Open Tasks** → Total number of tasks not yet completed
- **Done Today** → Tasks completed on the current day
- **Overdue** → Tasks that have passed their deadline
- **Active Cases** → Total ongoing cases handled by the team

Department Tasks

Tabs

Users can switch between departments:

- **Collections**
- **Sales**
- **Legal**

This allows viewing performance data for each department separately.

Analytics Section

Department Task Share

Displays a visual chart showing task distribution.

Example:

67% Collections Selected

Task Breakdown

- **Done** → Completed tasks
- **Remaining** → Pending tasks

Each includes:

- Task count
- Percentage progress

Total Tracked

Shows the total number of tasks being monitored.

Example:

Total Tracked: 9

Department Summary

Displays task details for the selected department.

Example (Collections):

- **Open** → 6
- **Done** → 3
- **Total** → 9

View More Option

View More Button

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LAO ASEAN LEASING PUBLIC COMPANY

View Less ▲

Case Statistics

Total Cases	120
Paid	85
Not Paid	35

ANALYTICS

Monthly Cases

This Month	22	33%
Last Month	18	27%
2 Month Delayed	6	9%
OA Cases	12	18%
SOA Cases	9	13%

TOTAL TRACKED 67

Expands the dashboard to show additional analytics and detailed data.

Top Performers Section

Top Performers (Today)

Displays staff members with the highest task completion.

Example:

- Alex Rivera → 5 tasks
- Priya Nair → 4 tasks
- Chen Wei → 3 tasks

Additional Analytics (Expanded View)

When expanded, the dashboard shows deeper insights:

Case Statistics

- **Total Cases** → Overall number of cases
- **Paid** → Successfully completed/paid cases
- **Not Paid** → Pending or unpaid cases

Monthly Cases

Displays a visual breakdown of case categories.

Includes:

- **This Month**

- **Last Month**
- **2 Month Delayed**
- **OA Cases**
- **SOA Cases**

Each shows:

- Number of cases
- Percentage contribution

Total Tracked (Analytics)

Shows total number of tracked segments.

Example:

Total Tracked: 67

Case Types & Tracking

Displays system-related tracking information.

Example:

- **GPS Offline** → Indicates location tracking issues

How to Use

View Team Performance

1. Open the **Team tab**
2. Review summary cards
3. Analyze department performance

Switch Department

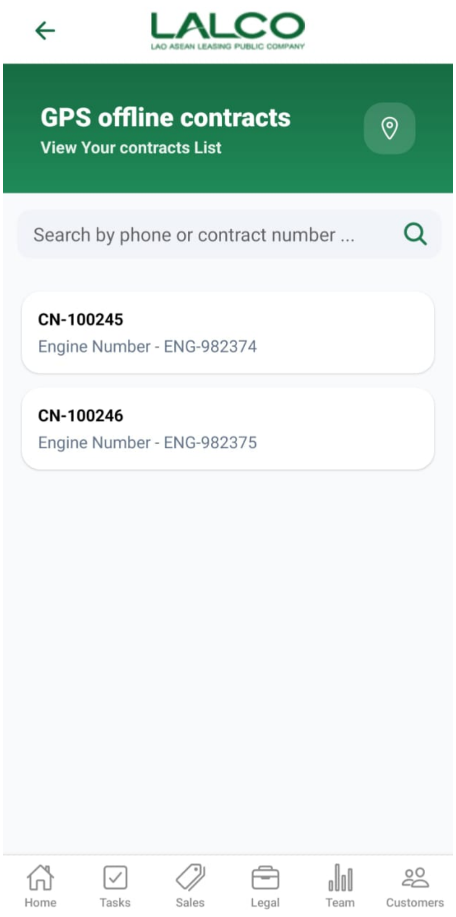
1. Tap **Collections / Sales / Legal**
2. View updated analytics

Expand Analytics

1. Tap **View More**
2. Review detailed reports

Tip:
Use this screen daily to monitor **team productivity, overdue tasks, and performance trends**.

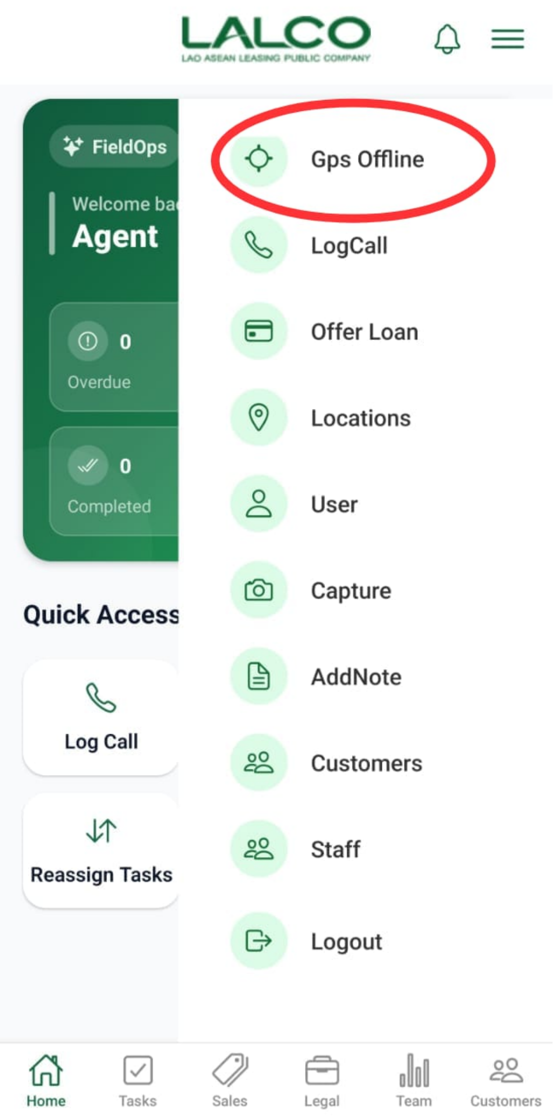
GPS Offline Screen



The **GPS Offline Screen** allows staff to view and manage contracts where GPS tracking is unavailable. It helps agents identify and review affected vehicles and customer details.

Access Path

Menu → GPS Offline



Location Icon

May be used to:

- View GPS-related information
- Access location tracking features

Search Function

Search Bar

Search by phone or contract number

Allows users to search using:

- Phone number
- Contract number

Contract List

Each item represents a GPS offline contract.

Example

CN-100245
Engine Number – ENG-982374

Information Displayed

- **Contract Number**
- **Engine Number**

How to Use

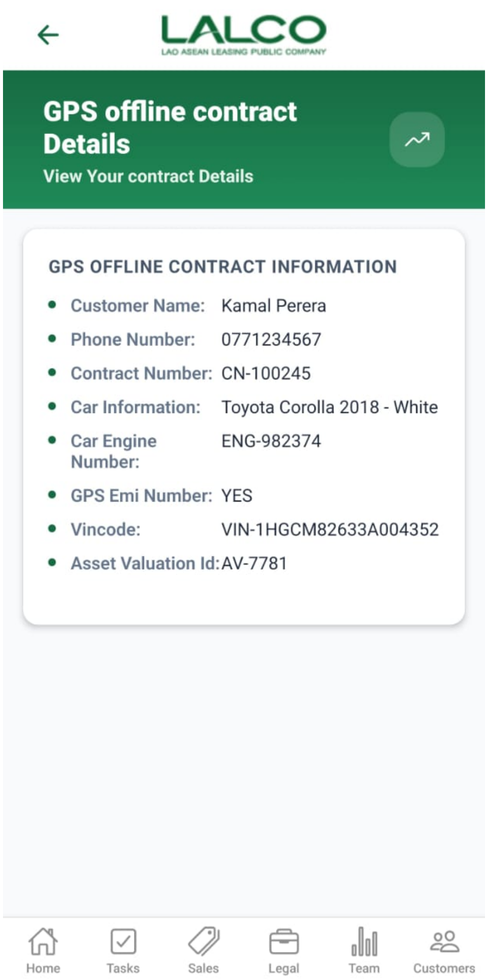
View Contracts

1. Open **GPS Offline** from menu
2. Browse the list
3. Use search if needed

Open Contract Details

1. Tap on a contract
2. View full information

GPS Offline Details Screen



Displays detailed information about a selected GPS offline contract.

Header Section

Page Title

Description

View Your contract Details

Contract Information

Displays complete details of the selected contract:

- **Customer Name** → Name of the customer
- **Phone Number** → Contact number
- **Contract Number** → Unique ID
- **Car Information** → Vehicle model and details
- **Car Engine Number** → Engine ID
- **GPS EMI Number** → GPS installment/availability status
- **Vin Code** → Vehicle identification number
- **Asset Valuation ID** → Internal tracking ID

Example

Customer Name: Kamal Perera
Contract Number: CN-100245
Car: Toyota Corolla 2018

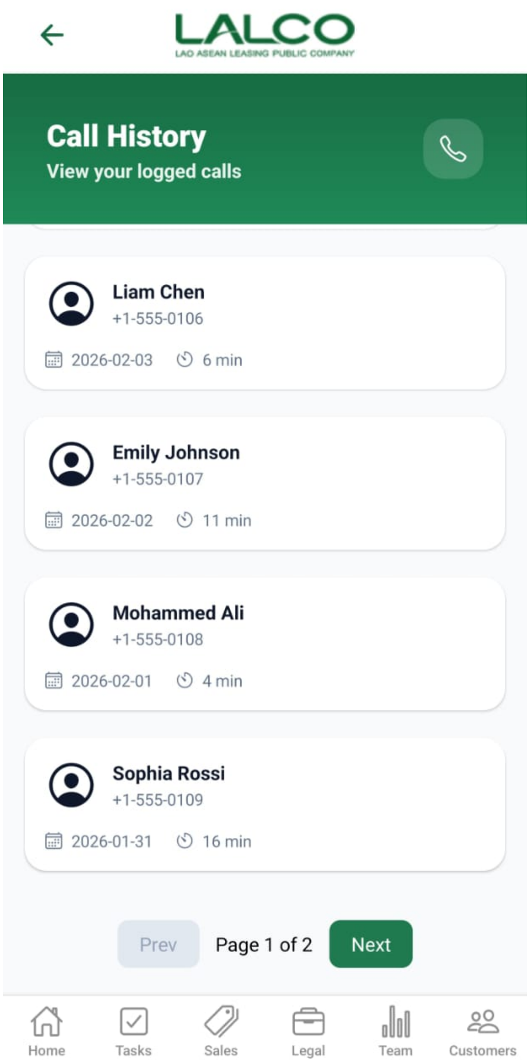
How to Use

View Details

1. Select a contract from the list
2. Review all customer and vehicle details

💡Tip:
Use this screen to quickly identify vehicles with **GPS issues** and take necessary follow-up actions.

Call History Screen



The **Call History Screen** allows staff to view and track all logged customer calls, including call duration and date. This helps monitor communication history and follow-ups.

Access Path

Home → Call History

Call History List Screen

Overview

Displays a list of all recorded calls made by the user.

Header Section

Page Title

Call History

Description

View your logged calls

Call Icon □□

- Used to initiate or access calling features

Call List

Each card represents a logged call.

Information Displayed

- **Customer Name**
- **Phone Number**
- **Call Date**
- **Call Duration**

Example

Liam Chen
+1-555-0106
Date: 2026-02-03
Duration: 6 min

Pagination

Located at the bottom of the screen.

Controls

- **Prev Button** → Go to previous page
- **Next Button** → Go to next page
- **Page Indicator** → Shows current page

Example

Page 1 of 2

How to Use

View Call History

1. Open **Call History** from menu
2. Scroll through the list
3. Use pagination to navigate

Analyze Calls

- Check call duration
- Review recent interactions
- Identify follow-up needs

Bottom Navigation Bar

Provides quick access to main modules:

- **Home**
- **Tasks**
- **Sales**
- **Legal**
- **Team**
- **Customers**

Empty State (Optional)

No call records available

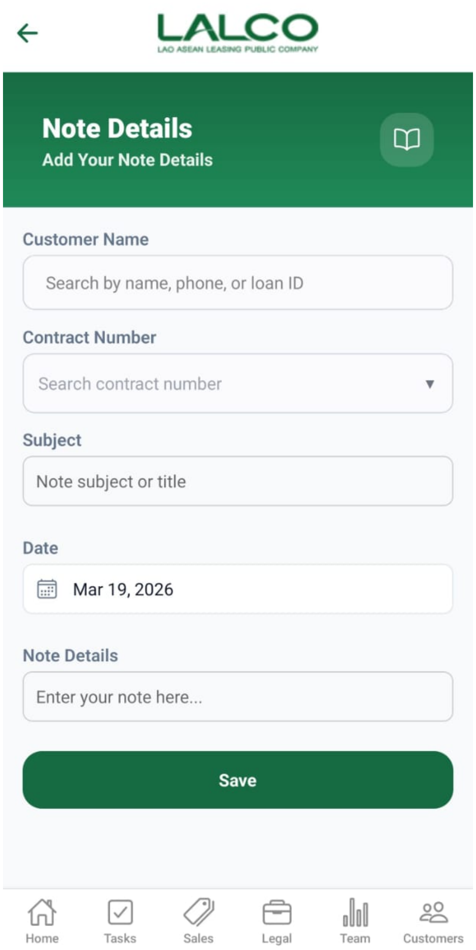
Notes

- Calls are listed in **descending order (latest first)**
- Data helps track staff communication performance

Tip:

Use this screen daily to ensure **no customer follow-up is missed**.

Note Details Screen



Overview

The **Note Details Screen** allows staff to create and save notes related to customers, contracts, and follow-ups. It helps track important interactions and maintain proper records.

Access Path

Home→ Add Note

Note Details Form

Overview

Provides input fields to create a new note linked to a customer and contract.

Header Section

Page Title

Note Details

Description

Add your note details

Book Icon

- Represents note/document management

Input Fields

1. Customer Name

Search by name, phone, or loan ID

- Search and select a customer
- Supports:
  - Customer name
  - Phone number
  - Loan ID

---

2. Contract Number

Search contract number

- Dropdown or searchable field
- Links note to a specific contract

---

3. Subject

Note subject or title

- Short title describing the note

---

4. Date

Mar 19, 2026

- Default is current date
- May be editable

---

5. Note Details

Enter your note here...

- Main content of the note
- Used for:
  - Call summaries
  - Customer updates

    - Follow-up actions

Action Button

Save Button

- Label: **Save**
- Function:
    - Stores the note
    - Links it to selected customer and contract

How to Use

Create a Note

1. Open **Note Details**
2. Search and select a **Customer**
3. Select **Contract Number**
4. Enter a **Subject**
5. Verify or update the **Date**
6. Enter detailed information in **Note Details**
7. Tap **Save**

Validation Rules (Recommended)

- Customer selection is **required**
- Contract number is **required**
- Subject should not be empty
- Note details must contain meaningful content

Success State

Note saved successfully

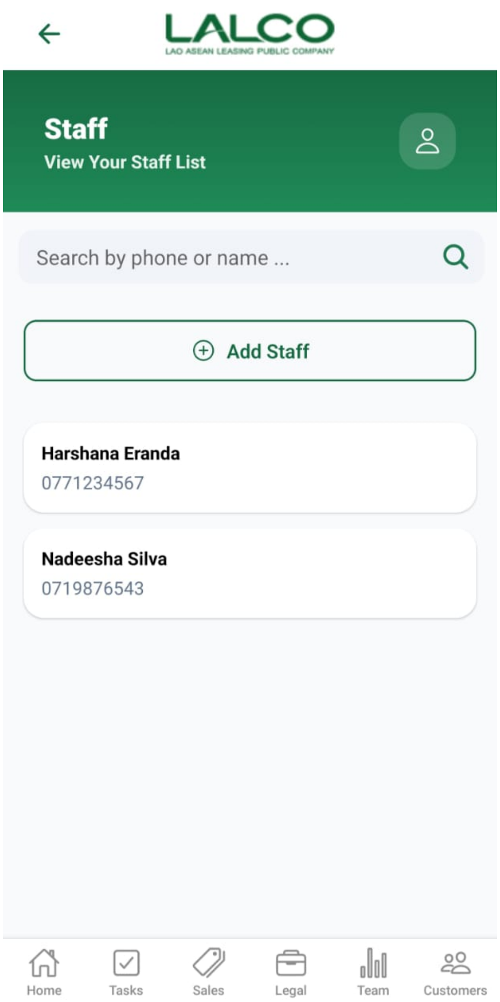
Error States

Please fill all required fields

Failed to save note. Try again

Tip:
Use notes immediately after calls or customer visits to ensure **accurate tracking and better follow-up management**.

Staff Screen



The **Staff Screen** allows users to view and manage all staff members in the system. It provides a searchable list of staff and an option to add new users.

Header Section

Page Title

Staff

Description

View Your Staff List

Search Function

Search Bar

Search by phone or name

Allows users to search staff by:

- Name
- Phone number

Add Staff

Add Staff Button

+ Add Staff

Allows users to create a new staff account.

Staff List

Each item represents a staff member.

Example:

Harshana Eranda
0771234567

Information Displayed

Each record shows:

- **Staff Name**
- **Phone Number**

How to Use

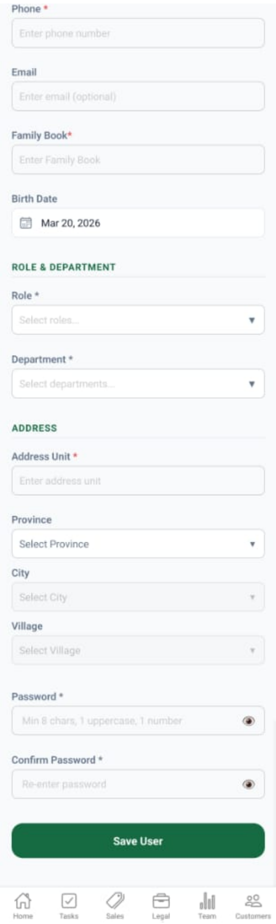
View Staff

1. Open the **Staff section**
2. Browse or search staff members

Add New Staff

1. Tap **Add Staff**
2. Fill in required details
3. Tap **Save User**

Add New User Screen



The **Add New User Screen** allows administrators to create new staff accounts by entering personal, role, and address details.

Personal Information

- **Name** → Full name of staff
- **Phone** → Contact number
- **Email** → Optional email address
- **Family Book** → Additional identification
- **Birth Date** → Date of birth

Role & Department

- **Role** → Select user role

- **Department** → Select department

Address

- **Address Unit** → Street or unit
- **Province** → Select province
- **City** → Select city
- **Village** → Select village

Security

- **Password** → Minimum 8 characters (with uppercase & number)
- **Confirm Password** → Re-enter password

Actions

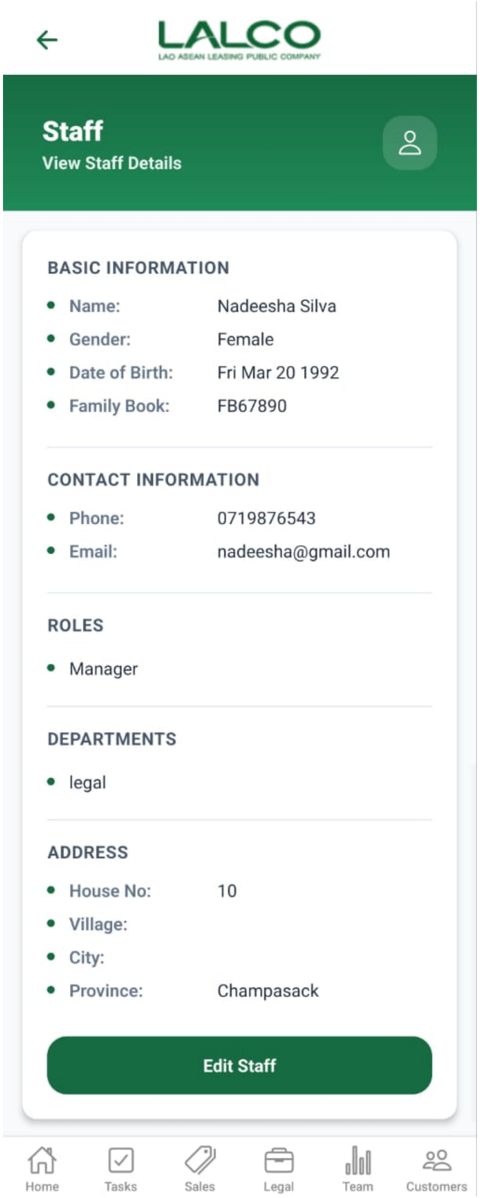
Save User

Creates the new staff account after validation.

Navigation

Menu → Staff → Add Staff → Save User

Staff Details Screen



Header Section

Page Title

Staff

Description

View Staff Details

Basic Information

Displays personal details of the staff member:

- **Name** → Full name of the staff member
- **Gender** → Male or Female
- **Date of Birth** → Staff member’s birth date
- **Family Book** → Official identification/reference number

Contact Information

- **Phone** → Contact number
- **Email** → Email address

Roles

Shows the role assigned to the staff member.

Example:

- Manager

Departments

Displays the department the staff belongs to.

Example:

- Legal

Address

- **House No** → House number
- **Village** → Village name
- **City** → City name
- **Province** → Province

Actions

Edit Staff

Allows users to update or modify staff information.

How to Use

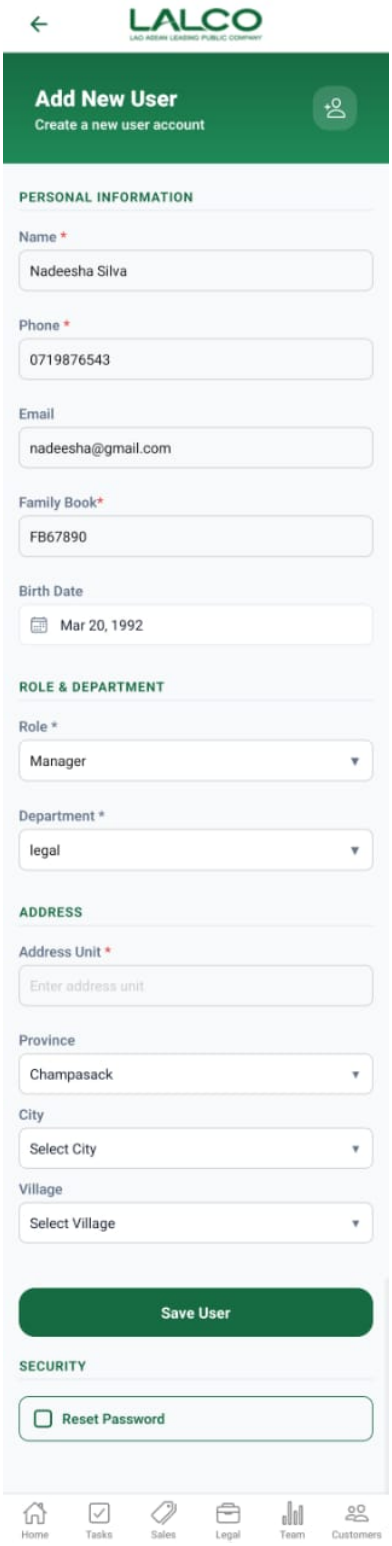
View Staff Details

1. Open the **Staff section**
2. Select a staff member
3. View all details

Edit Staff

1. Tap **Edit Staff**
2. Update required fields
3. Save changes

Edit User Screen



The Edit **New User Screen** allows administrators to create a new staff account by entering personal, role, and address details.

Personal Information

- **Name** → Staff full name
- **Phone** → Contact number
- **Email** → Email address
- **Family Book** → Identification number
- **Birth Date** → Date of birth

Role & Department

- **Role** → Select staff role (e.g., Manager)
- **Department** → Select department (e.g., Legal)

Address

- **Address Unit** → House or unit number
- **Province** → Select province
- **City** → Select city
- **Village** → Select village

Actions

Save User

Creates the new staff account after entering all required details.

Security

Reset Password

Option to reset or assign a password for the user.

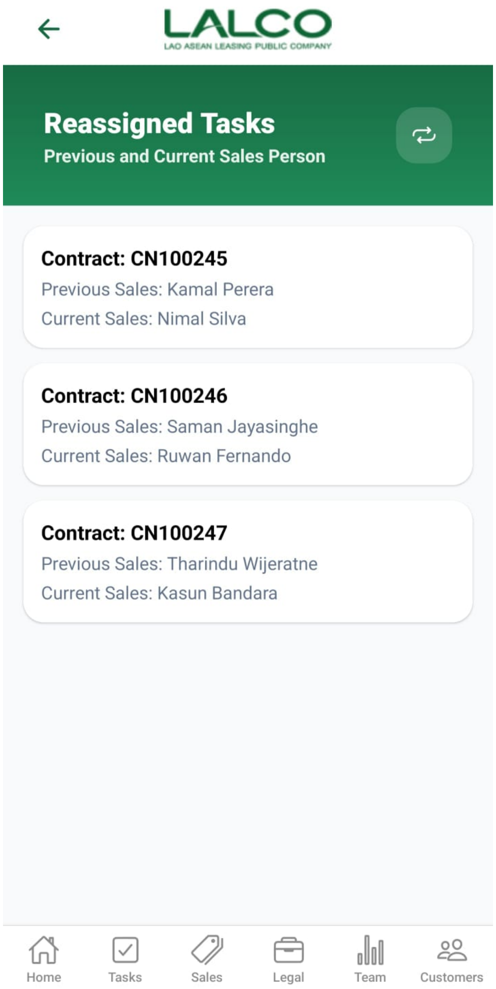
How to Use

Add New User

1. Open **Edit Staff**
2. Enter all required information
3. Select role and department
4. Fill address details
5. Tap **Save User**

Reassigned Tasks Screen

Reassigned Tasks Screen



The **Reassigned Tasks Screen** allows users to view tasks that have been reassigned between sales staff. It shows both previous and current sales persons for each contract.

Task List

Each item represents a reassigned task.

Example:

Contract: CN100245
Previous Sales: Kamal Perera
Current Sales: Nimal Silva

Information Displayed

Each record shows:

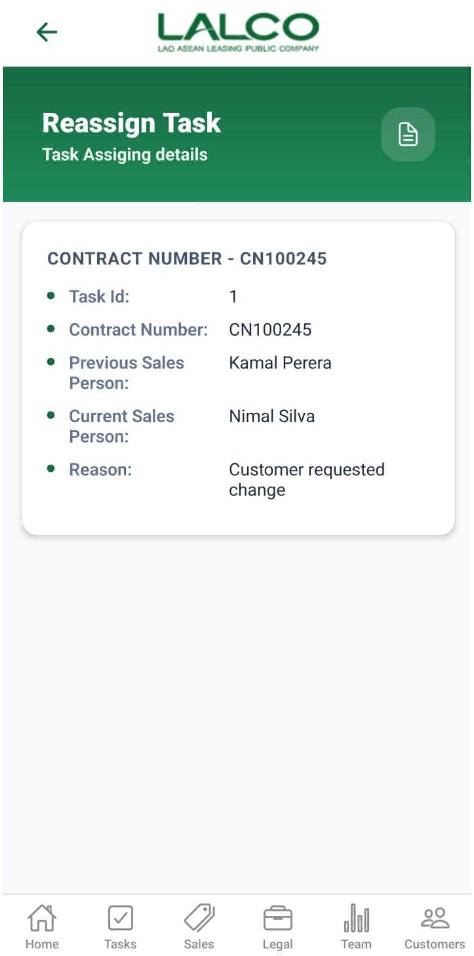
- **Contract Number**
- **Previous Sales Person**
- **Current Sales Person**

How to Use

View Reassigned Tasks

1. Open the **Reassigned Tasks section**
2. Browse the list of tasks
3. Tap a task to view more details

Reassign Task Details Screen



The **Reassign Task Details Screen** shows detailed information about a specific reassigned task, including the reason for reassignment.

Task Details Section

Displays key information:

- **Task ID** → Unique task identifier
- **Contract Number** → Related contract
- **Previous Sales Person**
- **Current Sales Person**
- **Reason** → Explanation for reassignment

Example:

Task ID: 1
Contract Number: CN100245

Previous Sales Person: Kamal Perera
Current Sales Person: Nimal Silva
Reason: Customer requested change

How to Use

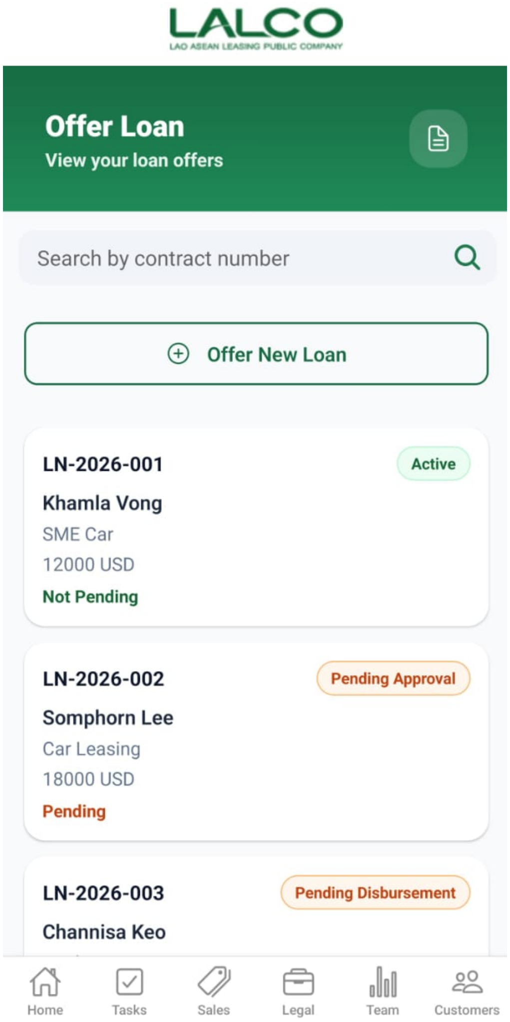
View Task Details

1. Select a task from the list
2. Review all reassignment details

Navigation

Reassigned Tasks → Select Task → View Details

Offer Loan Screen



The **Offer Loan Screen** allows staff to view existing loan offers and create new loan applications for customers.

Search Function

Search Bar

Search by contract number

Allows users to search by:

- Contract number
- Loan ID

Main Action

Offer New Loan

Button used to create a new loan offer.

Loan List

Each item represents a loan offer.

Example:

LN-2026-001
Khamla Vong
SME Car
12000 USD
Active

Information Displayed

Each record shows:

- **Loan Number**
- **Customer Name**
- **Loan Type**
- **Loan Amount**
- **Status**

Status Types

Common statuses include:

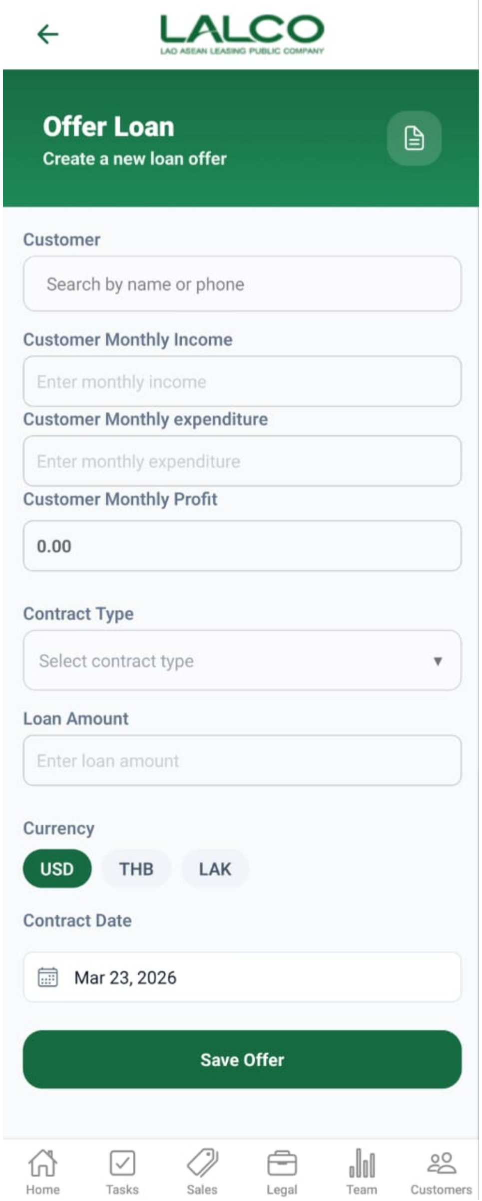
- **Active** → Loan is currently active
- **Pending Approval** → Waiting for approval
- **Pending Disbursement** → Approved but funds not released
- **Pending** → Still in process
- **Not Pending** → No pending actions

How to Use

View Loan

1. Open the **Offer Loan tab**
2. Browse or search records
3. Tap a loan to view details

Offer Loan Screen



The **Create Offer Loan Screen** allows staff to create a new loan offer by entering customer and financial details.

Form Fields

Customer

Search customer by name or phone number

Customer Monthly Income

Enter total monthly income

Customer Monthly Expenditure

Enter monthly expenses

Customer Monthly Profit

Automatically calculated

Contract Type

Select loan type (e.g., SME Car)

Loan Amount

Enter loan value

Currency

Select currency:

- USD
- THB
- LAK

Contract Date

Select the loan start date

Action

Save Offer

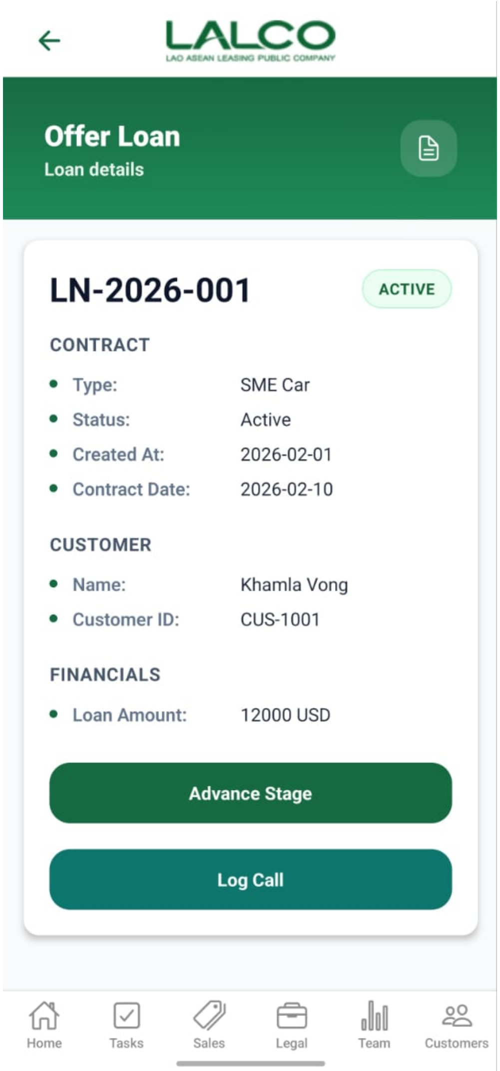
Saves the new loan application

How to Use

Create Loan Offer

1. Tap **Offer New Loan**
2. Fill in all required fields
3. Tap **Save Offer**
4. Loan will be added to the list

Offer Loan Details Screen



The **Offer Loan Details Screen** shows full information about a selected loan and allows staff to take actions.

Loan Details

Displays:

- **Loan Number**
- **Contract Type**
- **Status**
- **Created Date**
- **Contract Date**

Customer Information

- **Customer Name**
- **Customer ID**

Financial Information

- **Loan Amount**

Actions

Advance Stage

Moves the loan to the next stage

Log Call

Records customer communication

How to Use

View Details

1. Select a loan from the list
2. Review all information

Update Loan

1. Tap **Advance Stage**
2. Update progress
3. Save changes

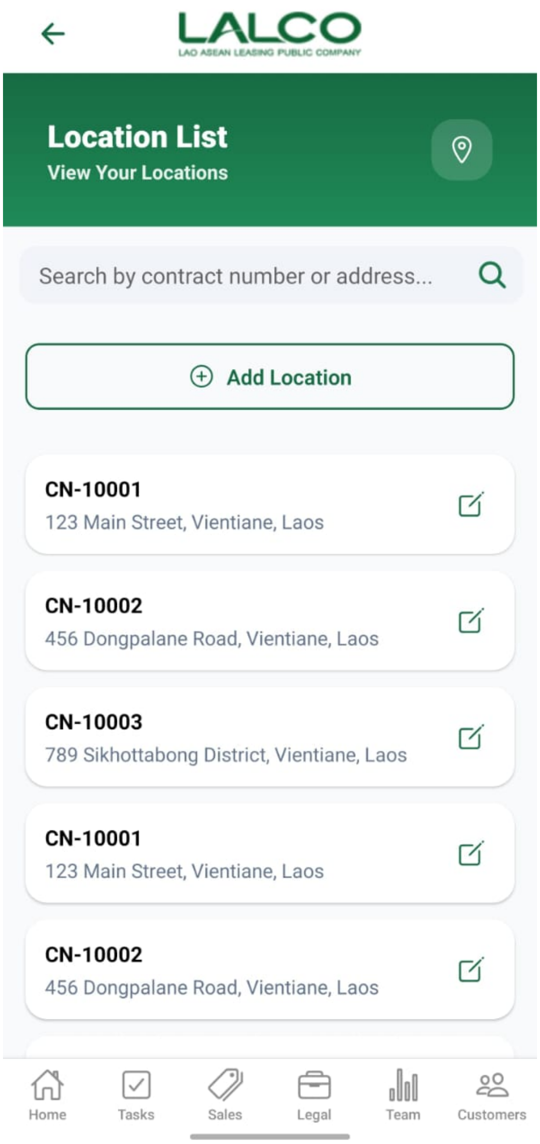
Log Call

1. Tap **Log Call**
2. Enter details
3. Save

Navigation

Offer Loan → Select Loan → View Details / Create Loan

Location Screen



The **Location Screen** allows staff to view and manage collection locations linked to contracts. Users can search, add, and update location details.

Search Function

Search Bar

Search by contract number or address...

Allows users to search by:

- Contract number
- Address

Main Action

Add Location

Button used to create a new collection location.

Location List

Each item represents a saved location.

Example:

CN-10001
123 Main Street, Vientiane, Laos

Information Displayed

Each record shows:

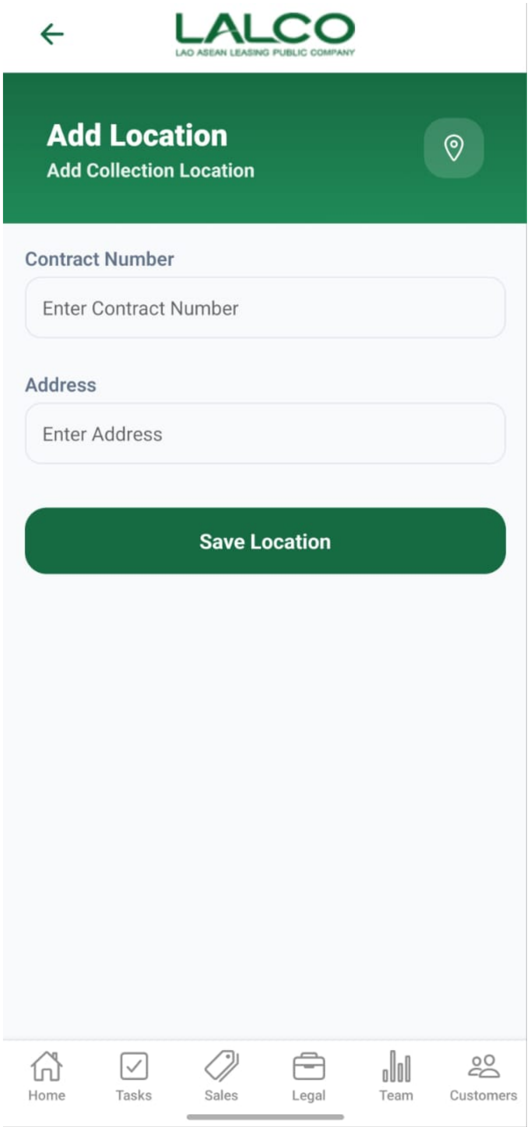
- **Contract Number**
- **Address**

How to Use

View Locations

1. Open the **Location screen**
2. Browse or search locations
3. Tap edit icon to modify

Add Location Screen



The **Add Location Screen** allows staff to create or update a collection location for a contract.

Form Fields

Contract Number

Enter or select the contract number

Example:

CN-10001

Address

Enter the full collection address

Example:

123 Main Street, Vientiane, Laos

Action

Save Location

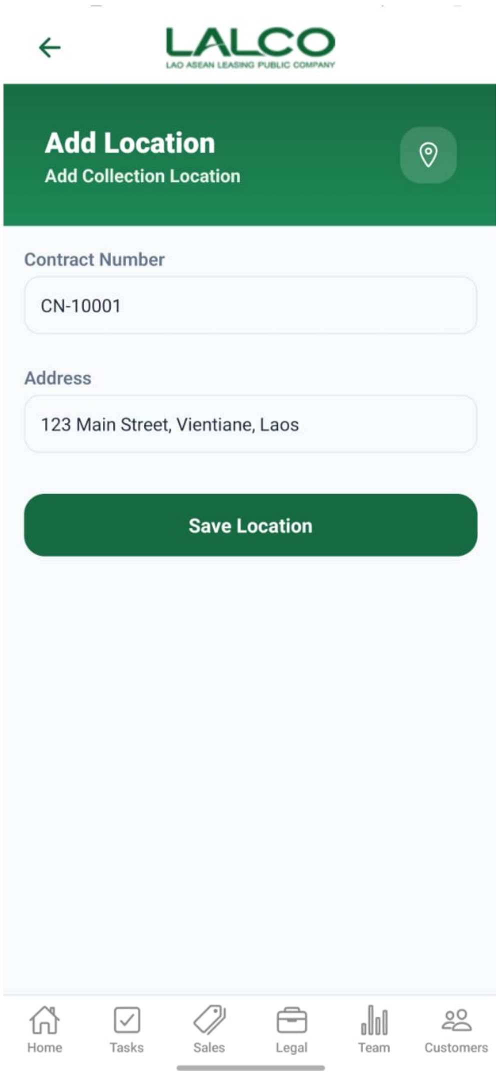
Saves the location details to the system

How to Use

Add Location

1. Tap **Add Location**
2. Enter contract number
3. Enter address
4. Tap **Save Location**

Edit Location

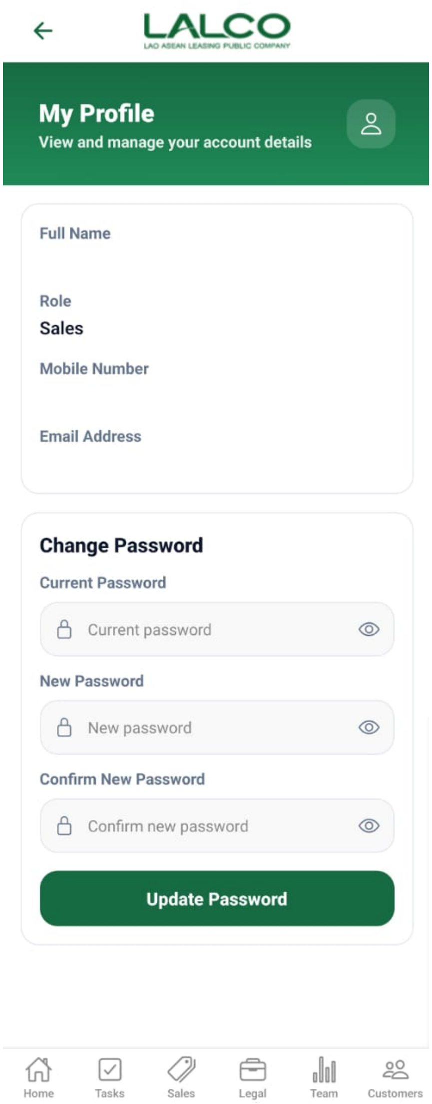


1. Tap edit icon from list
2. Update details
3. Tap **Save Location**

Navigation

Location List → Add Location / Edit Location

Profile Screen



The **Profile Screen** allows users to view their personal account details and manage their login credentials, including updating their password.

Profile Information

Displays user account details:

- **Full Name** → User's registered name
- **Role** → User role in the system (e.g., Sales)
- **Mobile Number** → Registered phone number
- **Email Address** → User's email

Change Password Section

Allows users to update their account password.

Form Fields

Current Password

Enter your existing password

New Password

Enter a new password

Confirm New Password

Re-enter the new password for confirmation

Visibility Icon

Allows users to:

- Show password
- Hide password

Action

Update Password

Saves and updates the new password

How to Use

View Profile

1. Open the **Profile screen**
2. Review your account details

Change Password

1. Enter **Current Password**
2. Enter **New Password**
3. Confirm the new password
4. Tap **Update Password**

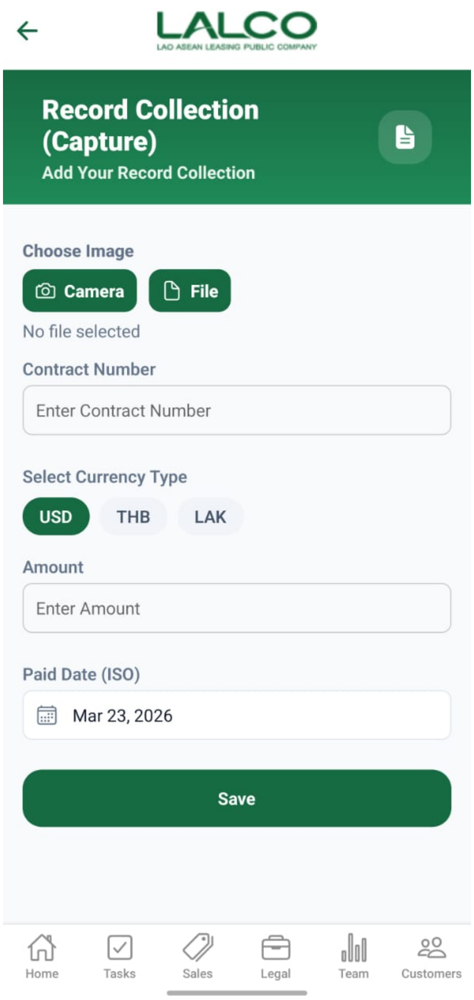
Security Tips

- Use a **strong password**
- Do not share your credentials
- Change your password regularly

Navigation

Menu → User → View / Update Password

Capture Screen



The **Record Collection (Capture) Screen** allows staff to record payment collections by capturing proof (image/file) and entering transaction details such as contract number, amount, and payment date.

Image Upload Section

Choose Image

Users can attach proof of collection using:

- **Camera** → Capture image directly
- **File** → Upload from device

File Status

No file selected

Displays whether a file has been attached.

Form Fields

Contract Number

Enter the contract number related to the payment

Select Currency Type

Choose one:

- **USD**
- **THB**
- **LAK**

Amount

Enter the collected amount

Paid Date (ISO)

Select the payment date

Example:

Mar 23, 2026

Action

Save

Saves the collection record to the system

How to Use

Record Collection

1. Upload image using **Camera** or **File**
2. Enter **Contract Number**
3. Select **Currency Type**
4. Enter **Amount**
5. Select **Paid Date**
6. Tap **Save**

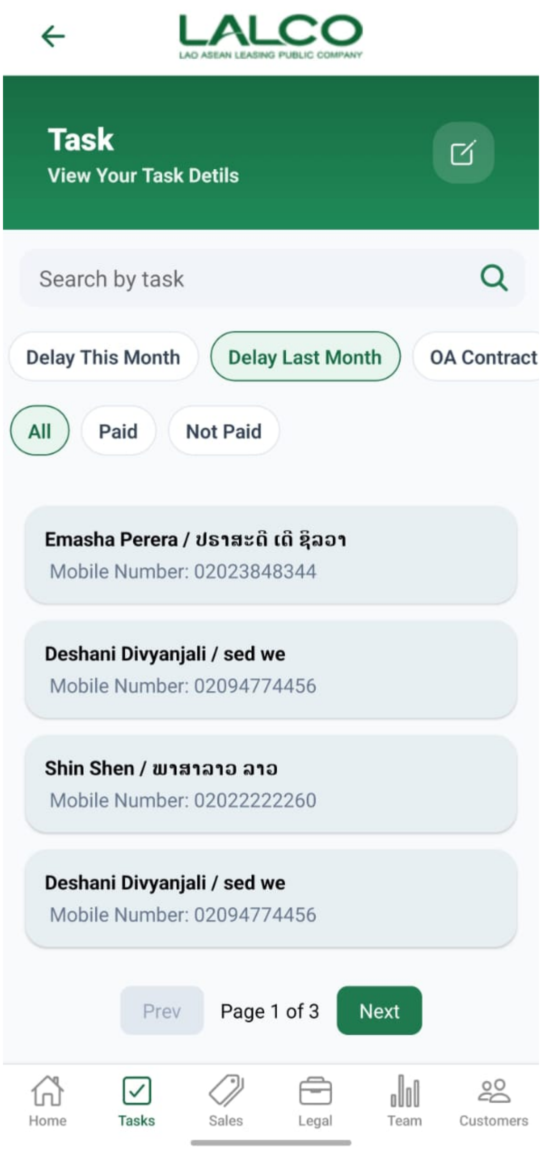
Notes

- Always attach **proof of payment**
- Ensure contract number is correct
- Verify amount before saving

Navigation

Menue → Capture

Task Screen



The **Task Screen** allows staff to view, filter, and manage assigned customer tasks related to payments and follow-ups.

Search Function

Search Bar

Search by task

Allows users to search tasks by:

- Customer name
- Task-related details

Filters

Time Filters

- **Delay This Month** → Tasks delayed in current month
- **Delay Last Month** → Tasks delayed in previous month
- **OA Contract** → Tasks related to OA contracts

Payment Filters

- **All** → Show all tasks
- **Paid** → Completed payments
- **Not Paid** → Pending payments

Task List

Each item represents a customer task.

Example:

Emasha Perera
Mobile Number: 02023848344

Information Displayed

Each record shows:

- **Customer Name**
- **Mobile Number**

Pagination

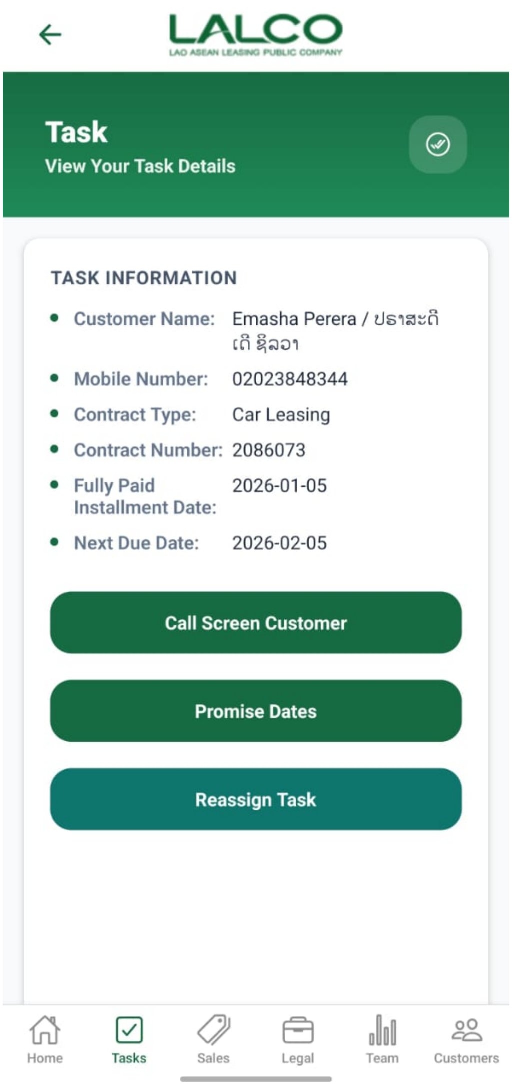
- **Prev** → Go to previous page
- **Next** → Go to next page
- Displays current page (e.g., Page 1 of 3)

How to Use

View Tasks

1. Open the **Task screen**
2. Use filters to narrow results
3. Search if needed
4. Select a task to view details

Task Details Screen



The **Task Details Screen** provides complete information about a selected task and allows staff to take follow-up actions.

Task Information

Displays:

- **Customer Name**
- **Mobile Number**
- **Contract Type**
- **Contract Number**
- **Fully Paid Installment Date**
- **Next Due Date**

Actions

Call Screen Customer

Initiates customer follow-up or call process

Promise Dates

Set or update customer promised payment dates

Reassign Task

Assign task to another staff member

How to Use

Manage Task

1. Select a task from the list
2. Review task information
3. Choose an action:
   - Call customer
   - Set promise date
   - Reassign task

Navigation

Task List → Select Task → View Details → Take Action