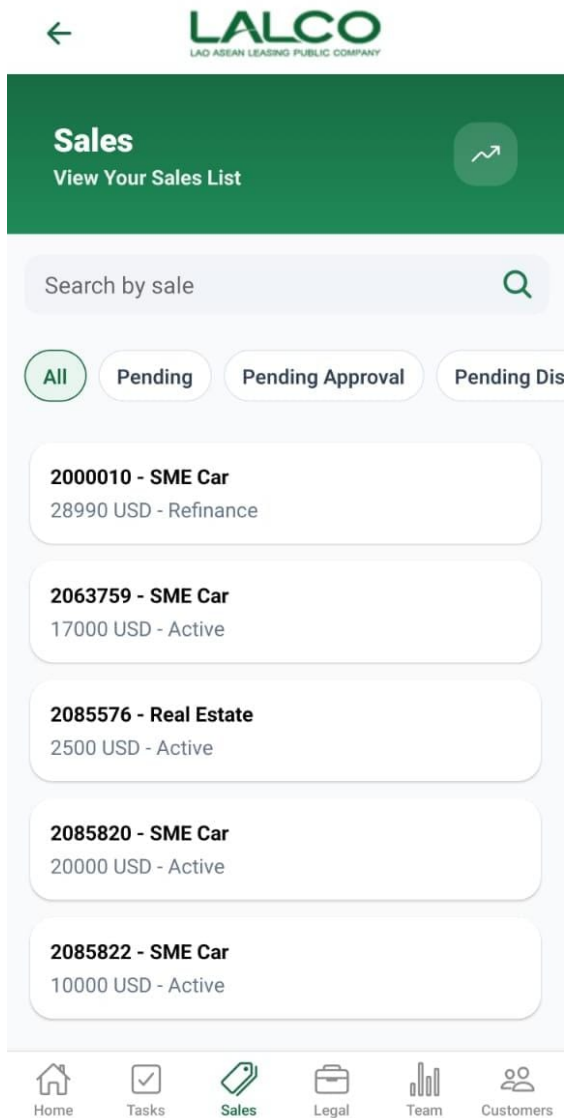


# Sales Screen



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- **Cancelled** → Loan has been cancelled and is no longer valid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

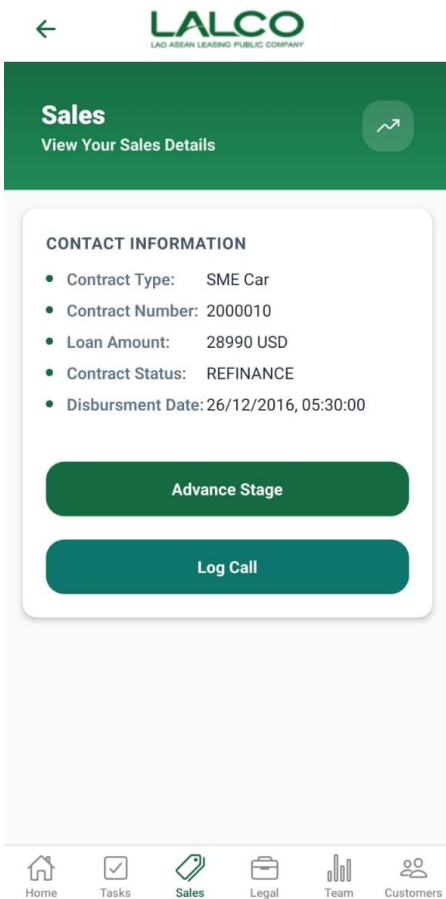
1. Tap on a filter (e.g., *Pending*).
  2. The list updates based on selection.
- 

**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.

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## 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.

■

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Revision #1

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