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How to update Loan Details in Bookings?

3 years ago · Updated

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When booking is converted to SOLD status, you may key in Purchaser's Loan info such as Banker, Bank, and Loan Amount into the booking for recording purposes.

1. Go to BOOKINGS > (Select booking)

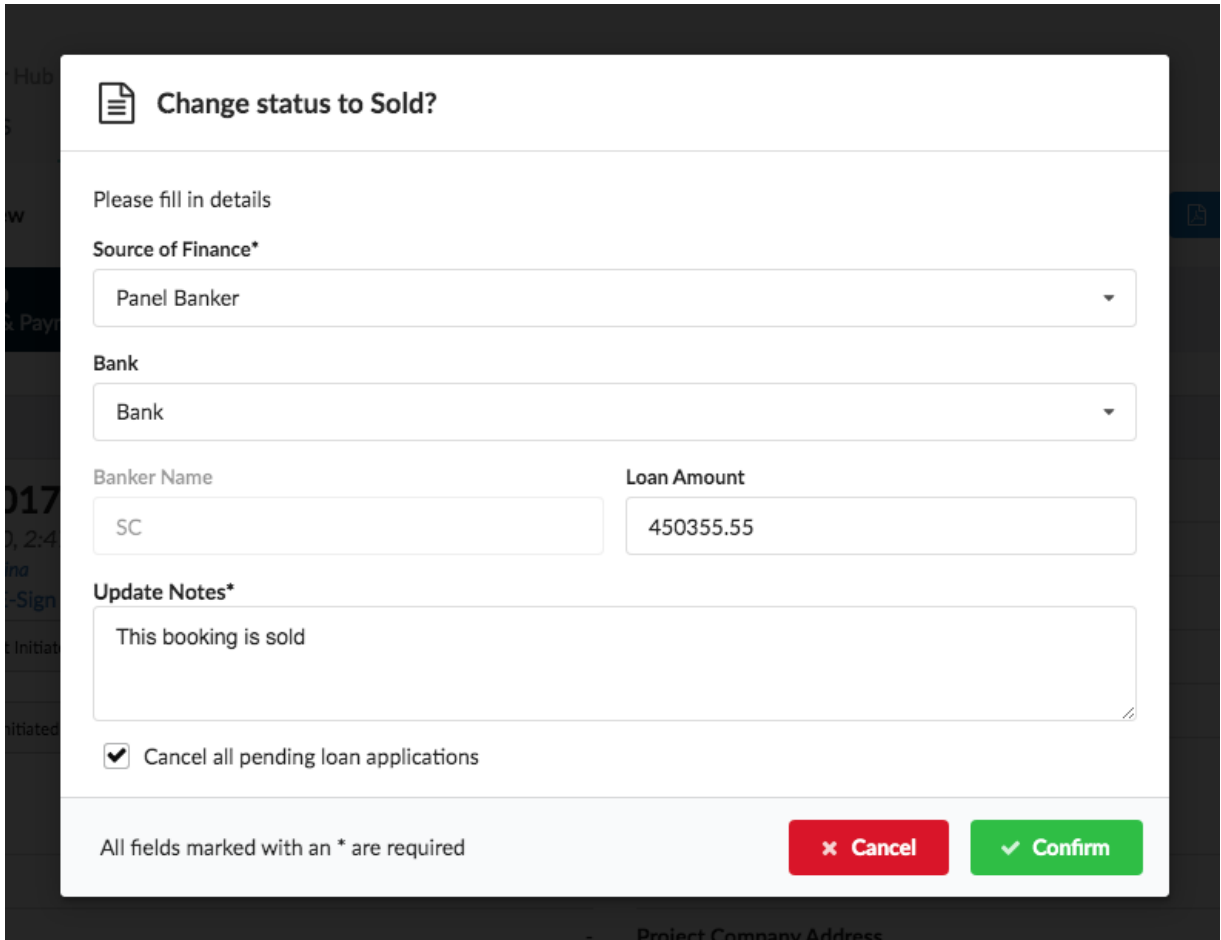
2. Click the Status drop down to change to Sold. There will be a prompt.

The screenshot shows a modal window titled "Change status to Sold?". Below the title is a document icon and the text "Please fill in details". The form contains several fields: "Source of Finance*" with a dropdown menu showing "Panel Banker"; "Bank" with a dropdown menu showing "Others"; "Bank Name" with a text input field; "Banker Name" with a text input field; "Loan Amount" with a text input field containing the value "0"; and "Add Notes*" with a large text area. At the bottom, there is a checkbox labeled "Cancel all pending loan applications" which is checked. A footer note states "All fields marked with an * are required". Two buttons are at the bottom right: a red "Cancel" button and a green "Confirm" button. Red rounded rectangles highlight the "Bank Name", "Banker Name", and "Loan Amount" input fields.

3. Select the Bank.

- These banks will be the same banks in Loan Tracker Bank
- Banker Name will be automatic
- If Bank Loan not in the list, choose Others and key in Banker Name

4. Key in Loan Amount (optional)



Change status to Sold?

Please fill in details

Source of Finance*

Panel Banker

Bank

Bank

Banker Name

SC

Loan Amount

450355.55

Update Notes*

This booking is sold

☒ Cancel all pending loan applications

All fields marked with an * are required

Cancel **Confirm**

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✗ No

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