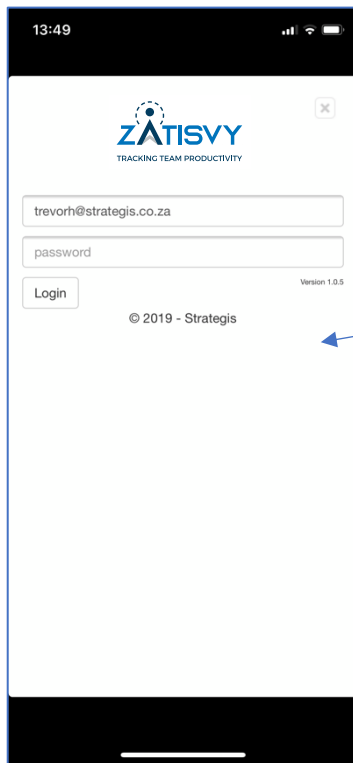
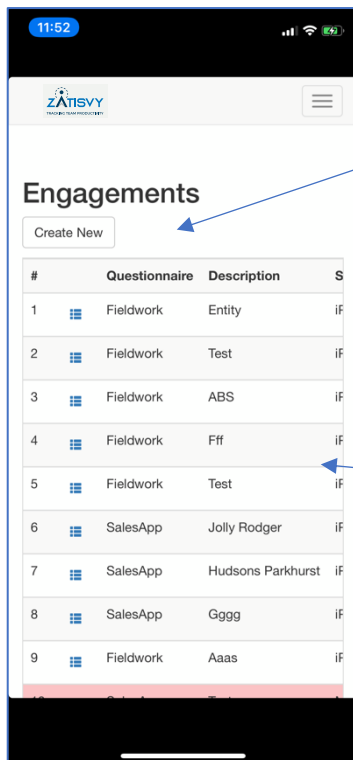


LOG IN PAGE



This is the Log In page – Landing page after clicking on app logo

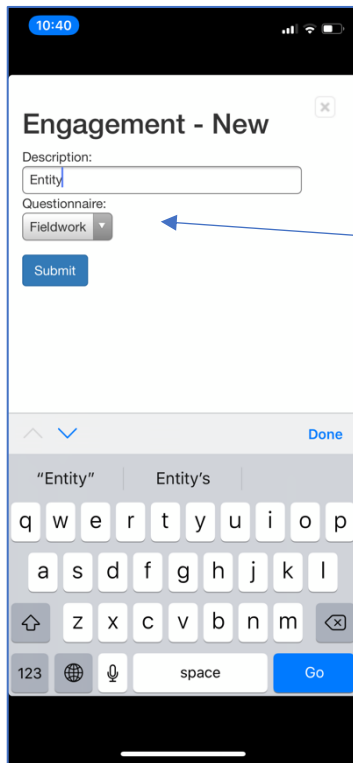
START PAGE



Click to Start New Engagement

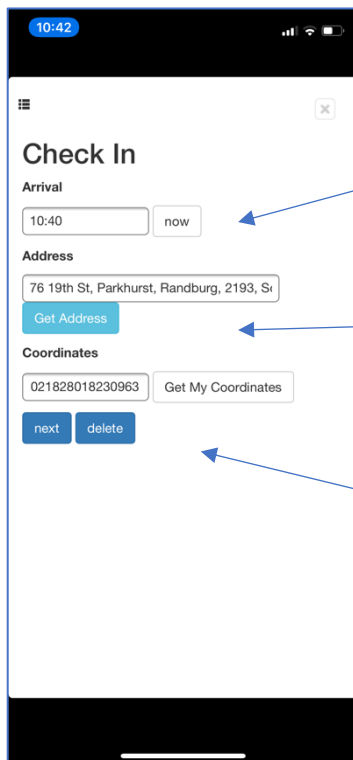
Past Engagements (can be selected and edited)

LANDING PAGE



Choose Questionnaire from Drop Down

CHECK IN

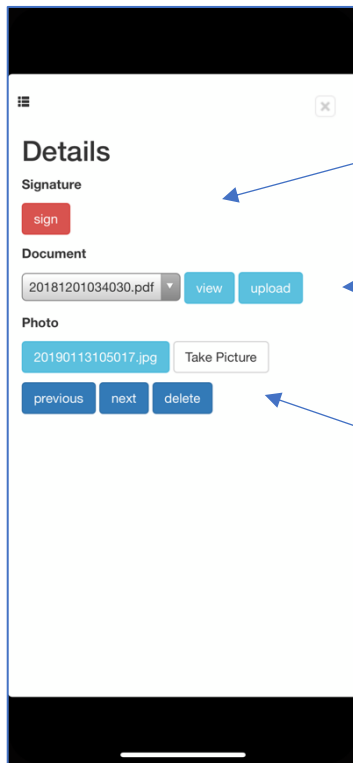


Enter Time or click on now for current time

Click on Get Address button and the address box will be populated

Click on Get my Co-Ordinates to get position

SIGN, DOCUMENT, PHOTO



Sign on mobile device

Scan document using Adobe Scan and upload

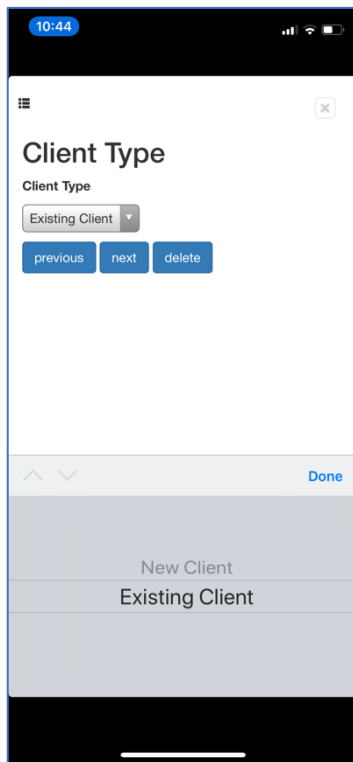
Enter Time or click on now for current time

SIGNATURE



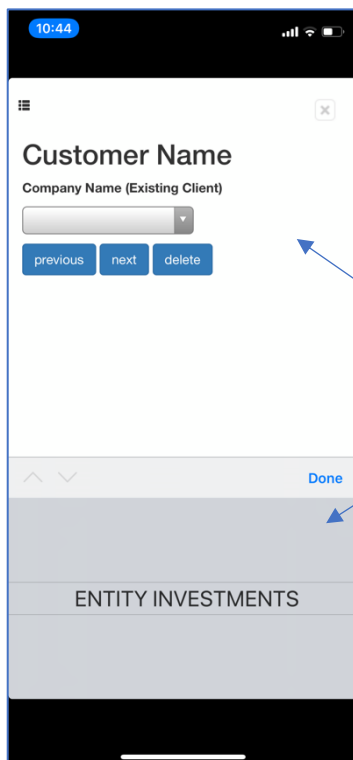
Enter Time or click on now for current time

NEW OR EXISTING CUSTOMER



Choose between new or existing clients

CHOOSE EXISTING COMPANY



Existing customers are preloaded and will appear in the dropdown when user is within a specific radius

CHECKLIST, RADIO BUTTONS AND COMMENTS

07:12

Feedback

Interest in Other Products

- Overdraft
- Fixed Asset Finance

Number of Sales Staff

- 1-5
- 6-10
- More than 10

Comments

There is a good opportunity

previous next delete

Utilises Check List. Radio Buttons and Free Hand Comment boxes to capture data

ISSUES ARISING

10:51

Issue Arising

Section Email Recipient

- trevorh@lightstone.co.za
- trevorh@strategis.co.za

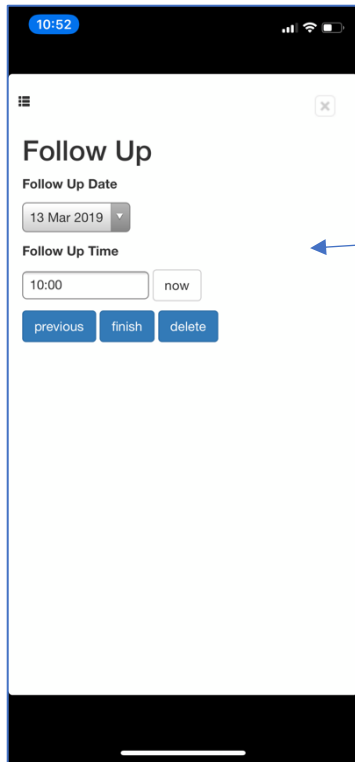
Issue

Contact Peter Fleming

previous next delete

Issues can be emailed from the app to designated persons with messages for action

FOLLOW UP



Set up a follow up meeting that is loaded into the users Outlook calendar