



Client Name Bread > Crumb > Trail

Summary Documents Additional Info Loan #1 Loan #2

Main Action + Action #2 + Action #2 Actions

Popup Dialogs

Key Points:

Client Name in big type  
Bread crumb trail to right of name

Tabs for client data:  
- 3 fixed (Summary, Docs, Additional Info)  
- transient for Loan and Savings details

Actions bar below tabs:  
Main Action - spacebar  
Other Primary Actions (optional) - spacebar  
All Actions dropdown menu  
Popup Dialog on right (optional)

Content area - see remaining screens for options

Dialog

See All

Item 1...  
5 min ago

Item 2...  
12 hours ago

Item 3...  
Feb. 21, 2013

General Tab Design



### Client Name

Bread Crumb > Trail

Summary

Documents

Additional Info

Loan #1

Loan #2

Main Action

All Actions



Questions

Photo

Primary Data

GRAPH 2

GRAPH 1

Notes



Loan Accounts

Balance

Status

Savings Accounts

#### Client Layout 1 - Key Points:

- Photo to left
- Primary Data and 2 spots for graphs (or text) across top
- Loan and Savings aligned with Primary Data
- Notes display on right
- Questions as a popup in actions bar



**Claire Client** [Branch > Center > Group > Claire Client](#)

[Summary](#)
[Documents](#)
[Additional Info](#)
[Loan #1](#)
[Loan #2](#)

[Edit Client](#)
⚙️ Actions
📅 Questions

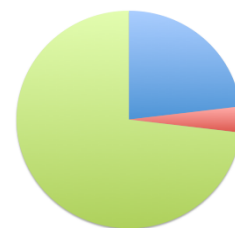


Account No.: **200152006**  
 External ID: 532921843  
 Activation Date: 02 April 2012  
 Office: Bangalore  
 Group: Triangle Group  
 Loan Officer: Lorenz Guzman  
 Loan Cycle: 2

**PPI - 2.45**



**Loan Performance**



**Notes**

**Lorenz Guzman:**  
 Will miss Tuesday, Jun. 11, 2013 mtg. On vacation.  
 5 min ago

**System Admin:**  
 Transferred from Larry Lender to Lorenz Guzman on Jun 4, 2013.  
 12 hours ago

**Larry Lender:**  
 Added national ID card.  
 Feb. 21, 2013

**System Admin:**  
 Another note.  
 Feb. 19, 2013

**System Admin:**  
 Yet another note.  
 Feb. 19, 2013

**System Admin:**  
 Client created.  
 Dec. 11, 2012

Loan Accounts		Balance	Status
Standard Client Loan	#0012013562	-11,356.2	Active in Bad Standing
Home Loan	#0012031092	-8,245.0	Application Approved
Car Loan	#0012020099	-2,000	Pending Approval
Agriculture Loan	#0012010104	-562.0	Active
Agriculture Loan	#0012010105	-1,000	Active

Savings Accounts		23% of loan value	
Mandatory Savings	#0023024128	4750.0	Active
Individual Savings	#0023016348	462	Active

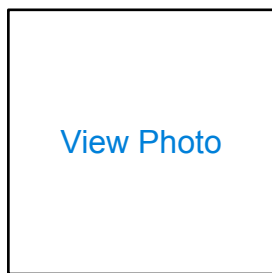
Example of layout



**Claire Client** [Branch > Center > Group > Claire Client](#)

- Summary
- Documents
- Additional Info
- Loan #1
- Loan #2

- Edit Client
- + New Loan
- + New Savings



Account No.: **200152006**  
 External ID: 532921843  
 Activation Date: 02 April 2012  
 Office: Bangalore  
 Group: Triangle Group  
 Loan Officer: Lorenz Guzman  
 Loan Cycle: 2

**PPI Scores**

2.45 - 7 Jul 2012  
 1.98 - 15 Dec 2011  
 2.10 - 2 Jun 2011

Due again in 4 weeks

**Loan Performance**

Balance: 8,329  
 Due Weekly: 511  
 Active Loans: 3  
 Delinquent: 1,256  
 Savings: 5,212  
 Mtgs Attended: 9  
 Mtgs Missed: 0

**Notes**

[Lorenz Guzman](#):  
 Will miss Tuesday, Jun. 11, 2013 mtg. On vacation.  
 5 min ago

[System Admin](#):  
 Transferred from Larry Lender to Lorenz Guzman on Jun 4, 2013.  
 12 hours ago

[Larry Lender](#):  
 Added national ID card.  
 Feb. 21, 2013

[System Admin](#):  
 Another note.  
 Feb. 19, 2013

Loan Accounts	Balance	Status
<a href="#">Standard Client Loan</a> #0012013562	-11,356.2	Active in Bad Standing
<a href="#">Home Loan</a> #0012031092	-8,245.0	Application Approved
<a href="#">Car Loan</a> #0012020099	-2,000	Pending Approval
<a href="#">Agriculture Loan</a> #0012010104	-562.0	Active
<a href="#">Agriculture Loan</a> #0012010105	-1,000	Active

Savings Accounts	23% of loan value
<a href="#">Mandatory Savings</a> #0023024128	4750.0 Active
<a href="#">Individual Savings</a> #0023016348	462 Active

**Question Groups**

PPI India	12-Oct-2012
Client Survey	24-Jul-2012

Example showing Question groups below Notes instead of as popup in actions bar.



### Client Name

Bread Crumb > Trail

Summary

Documents

Additional Info

Loan #1

Loan #2

Main Action | + New Loan + New Savings | All Actions

Notes

Photo

Primary Data

GRAPH 2

GRAPH 1

#### Performance History

#### Loan Accounts

Balance

Status

#### Savings Accounts

#### Question Groups

#### Client Layout 2 - Key Points:

- Photo to left
- Primary Data and 2 spots for graphs (or text) across top
- Loan and Savings aligned with Primary Data
- Performance History display on right
- Notes as a popup in actions bar
- Questions below Performance History



**Claire Client** [Branch > Center > Group > Claire Client](#)

[Summary](#)
[Documents](#)
[Additional Info](#)
[Loan #1](#)
[Loan #2](#)

[Edit Client](#)
[+ New Loan](#)
[+ New Savings](#)

Questions
 Notes

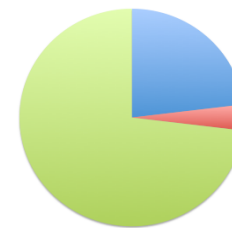


Account No.: **200152006**  
 External ID: 532921843  
 Activation Date: 02 April 2012  
 Office: Bangalore  
 Group: Triangle Group  
 Loan Officer: Lorenz Guzman  
 Loan Cycle: 2

PPI - 2.45



Loan Performance



Performance History

Last Loan	200
Active Loans	3
Delinquent	1,546
Total Savings	5,212
Meetings Attended	7
Meetings Missed	0
Standard Loan Cycle	2
Home Loan	1
Car Loan	0
Agricultural Loan	1
Agricultural Loan	1

Loan Accounts		Balance	Status	
<a href="#">Standard Client Loan</a>	#0012013562	-11,356.2	Active in Bad Standing	
<a href="#">Home Loan</a>	#0012031092	-8,245.0	Application Approved	
<a href="#">Car Loan</a>	#0012020099	-2,000	Pending Approval	
<a href="#">Agriculture Loan</a>	#0012010104	-562.0	Active	
<a href="#">Agriculture Loan</a>	#0012010105	-1,000	Active	

Savings Accounts		23% of loan value		
<a href="#">Mandatory Savings</a>	#0023024128	4750.0	Active	
<a href="#">Individual Savings</a>	#0023016348	462	Active	

Example showing Question groups with Notes as popups in actions bar.



### Claire Client

Branch > Center > Group > Claire Client

Summary

Documents

Additional Info

Loan #1

Loan #2

Edit Client

+ New Loan

+ New Savings

Actions

Questions

Notes

Photo

Primary Data

GRAPH 3

GRAPH 2

GRAPH 1

Loan Accounts	Balance	Status	Coming Due	Overdue	Interest (per year)

Savings Accounts	Coming Due	Interest (per year)

**Client Layout 3 - Key Points:**

- Photo to left
- Primary Data and 3 spots for graphs (or text) across top
- Loan and Savings aligned with Primary Data
- No display to right
- Questions and Notes as popups in actions bar



## Claire Client

Branch > Center > Group > Claire Client

Summary

Documents

Additional Info

Loan #1

Loan #2

Edit Client

+ New Loan

+ New Savings

Actions

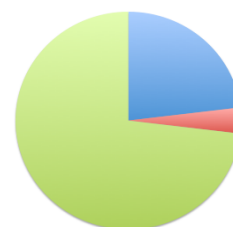
Questions

Notes



Account No.: **200152006**  
 External ID: 532921843  
 Activation Date: 02 April 2012  
 Office: Bangalore  
 Group: Triangle Group  
 Loan Officer: Lorenz Guzman  
 Loan Cycle: 2

Other Graph



PPI - 2.45



12-Dec-2012

Loan Performance



Loan Accounts		Balance	Status	Coming Due	Overdue	Interest (per year)
<a href="#">Standard Client Loan</a>	#0012013562	-11,356.2	Active in Bad Standing	245.0	1156.2	12% declining balance
<a href="#">Home Loan</a>	#0012031092	-8,245.0	Application Approved	164.0	0	12% declining balance
<a href="#">Car Loan</a>	#0012020099	-2,000	Pending Approval	0	0	36% declining balance
<a href="#">Agriculture Loan</a>	#0012010104	-562.0	Active	100.0	0	3% declining balance
<a href="#">Agriculture Loan</a>	#0012010105	-1,000	Active	100.0	0	2.5% declining balance

Savings Accounts				Coming Due	Interest (per year)
<a href="#">Mandatory Savings</a>	#0023024128	4750.0	Active	100.0	12%
<a href="#">Individual Savings</a>	#0023016348	462.3	Active	0	12%





### Claire Client

Branch > Center > Group > Claire Client

Summary

Documents

Additional Info

Loan #1

Loan #2

Edit Client

+ New Loan

+ New Savings

Questions

Notes

Photo

Primary Data

GRAPH 2

GRAPH 1

#### Performance History

Loan Accounts

Balance

Status

Coming Due

Overdue

Interest

Savings Accounts

Coming Due

Interest

#### Question Groups

#### Client Layout 4 - Key Points:

- Photo to left
- Primary Data and 2 spots for graphs (or text) across top
- Loan and Savings aligned with **Photo**
- Performance (or notes) to right**
- Questions (and Notes) as popups in actions bar



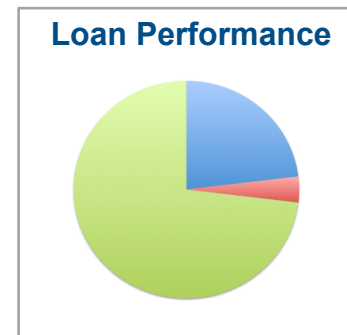
**Claire Client** [Branch > Center > Group > Claire Client](#)

[Summary](#)
[Documents](#)
[Additional Info](#)
[Loan #1](#)
[Loan #2](#)

[Edit Client](#)
[+ New Loan](#)
[+ New Savings](#)
[Actions](#)
[Notes](#)



Account No.: **200152006**  
 External ID: 532921843  
 Activation Date: 02 April 2012  
 Office: Bangalore  
 Group: Triangle Group  
 Loan Officer: Lorenz Guzman  
 Loan Cycle: 2



Performance History	
Last Loan	200
Active Loans	3
Delinquent	1,546
Total Savings	5,212
Meetings Attended	7
Meetings Missed	0
Standard Loan Cycle	2
Home Loan	1
Car Loan	0
Agricultural Loan	1
Agricultural Loan	1

Loan Accounts	Balance	Status	Coming Due	Overdue	Interest
Standard Client Loan #0012013562	-11,356.2	Active in Bad Standing	245.0	1156.2	12%
Home Loan #0012031092	-8,245.0	Application Approved	164.0	0	12%
Car Loan #0012020099	-2,000	Pending Approval	0	0	36%
Agriculture Loan #0012010104	-562.0	Active	100.0	0	3%
Agriculture Loan #0012010105	-1,000	Active	100.0	0	3%

Savings Accounts	Coming Due
Mandatory Savings #0023024128	100.0 12%
Individual Savings #0023016348	0 12%

Question Groups	
PPI India	12-Oct-2012
Client Survey	24-Jul-2012

Example showing Question groups below Performance History.

### Client: **Claire Client**

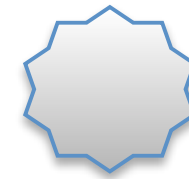
[New Loan](#)

New Savings


Edit Client Data




Active  
ID: 00002-12  
Loan Officer: Lisa Lender



Loan Performance

**Loan 1**   
Loan Name and Number  
Outstanding Balance:  
Amount Due:

**Loan 2**   
Loan Name and Number  
Outstanding Balance:  
Amount Due:

**Other Data**

Performance History:

Early Workflow Layout

## Claire Client

Branch > Center > Group > Claire Client



Edit Client

New Loan

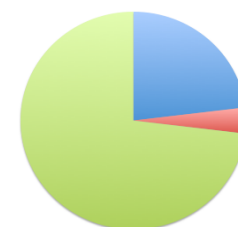
New Savings

Summary

Documents

Account No.: **200152006**  
 External ID: 532921843  
 Activation Date: 02 April 2012  
 Office: Bangalore  
 Group: Triangle Group  
 Loan Officer: Lorenz Guzman  
 Loan Cycle: 2

Loan Performance



Loan Accounts		Balance	Status
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Agriculture Loan	#0012010104	-562.0	Active
Agriculture Loan	#0012010105	-1,000	Active

Savings Accounts			
Mandatory Savings	#0023024128	4750.0	Active
Individual Savings	#0023016348	462	Active

Decided against client photo and tasks outside tabs.

Early Workflow Layout