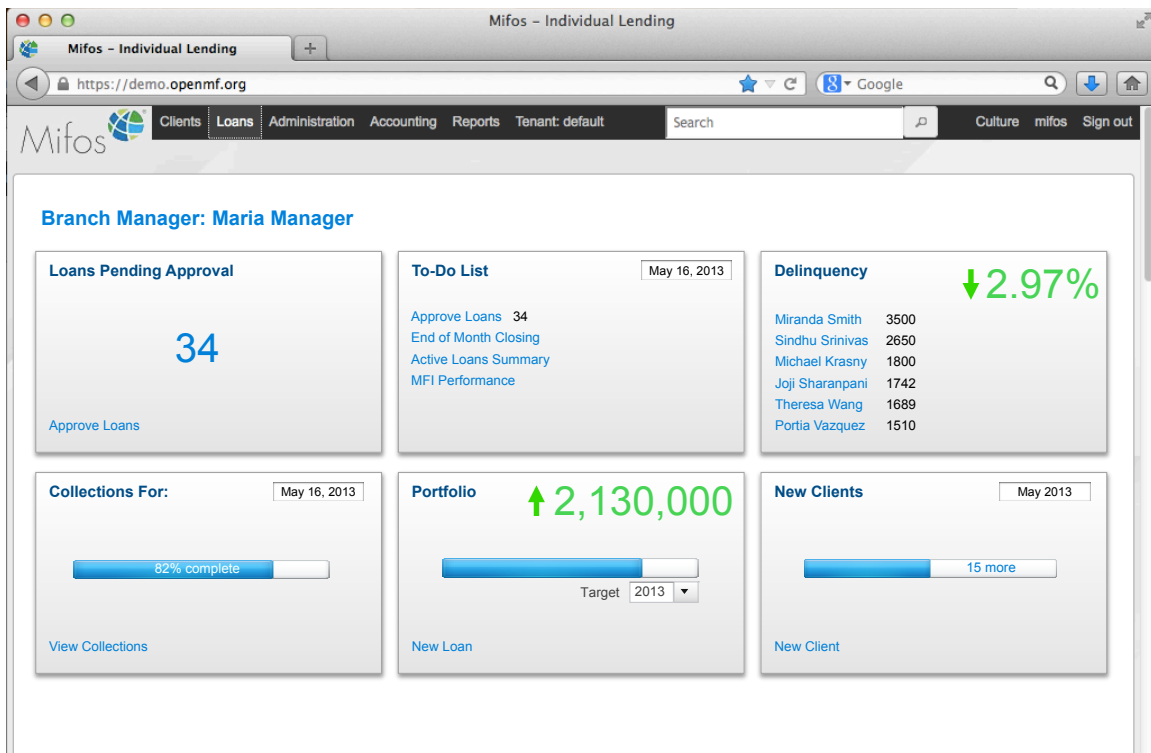


Hi-Fidelity Mockups – May 17, 2013

After seeing the new background on the Mifos X demo, I was inspired to play around a bit with some hi-fidelity mockups, just to get a feel what it could look like. I will probably enlist the help of some of my visual design colleagues to take a stab at “beautifying” the workflow designs (including the background – I’m not crazy about the black header region, pulling out the blues and greens from the logo would be better, I think.)

In any case, thought I share the ideas with you – basically I just took the existing background and added some realistic looking components for the client page and dashboard page.

Branch Manager Dashboard



Delinquency and portfolio numbers seemed to be important and we could include whether they are going up or down. Date fields would, of course, display the new calendar widget when clicked.

Client Page

The screenshot shows the Mifos Individual Lending interface. The browser address bar is <https://demo.openmf.org>. The navigation menu includes Clients, Loans, Administration, Accounting, Reports, and Tenant: default. The breadcrumb trail is Branch > Center > Group > Claire Client. On the left, there are buttons for New Loan, New Savings, and Edit Client. The main content area displays the client's profile for Claire Client, who is Active. Her account details are: Account No.: 200152006, External ID: 532921843, Activation Date: 02 April 2012, Office: Bangalore, Member of: Triangle Group, and Loan Cycle: 2. A pie chart titled 'Loan Performance' shows the distribution of loan status. Below this, there are tables for Loans, Savings, and Other. The Loans table lists a Standard Client Loan and a Car Loan. The Savings table lists Individual Savings and Mandatory Savings. The Other table shows Client Charges. A 'PPI' graph shows an upward trend. A 'Recent Notes' box contains a note from 5/5/2013 about a missed meeting. At the bottom, it indicates that 75% of the loan has been saved.

Branch > Center > Group > Claire Client

New Loan
New Savings
Edit Client

Claire Client Active

Account No.: 200152006
External ID: 532921843
Activation Date: 02 April 2012
Office: Bangalore
Member of: Triangle Group
Loan Cycle: 2

Loan Performance

Loans

Loan Type	Account No.	Amount	Status	Icon
Standard Client Loan	#0010002013562	-11,356.2	Active in Bad Standing	🚫
Car Loan	#0010002027323	-8,245.0	Application Approved	★

Savings

Savings Type	Account No.	Amount	Status	Icon
Individual Savings	#0020003024128	14,238.9	Active	✅
Mandatory Savings	#0020003016348	432.0	Active	✅

Other

Category	Amount	Status	Icon
Client Charges	0		✅

Percent of loan saved: **75%**

PPI

Recent Notes
5/5/2013 - missed meeting due to funeral

Played a bit with some graphics here. The loan performance graph, I'm thinking, would aggregate all loans together. Green shows how much has already been paid, red is how much is currently due and blue is how much is yet to be paid. Probably want tooltips that appear showing actual numbers when you hover over the regions.

PPI index – several people requested this information on the main client page. Perhaps this needs some numbers, but I thought a graph showing the trend over time would be good.

Also added the percent of loan saved as this seems to be an important number to several organizations. This number must be over 20% for most MFIs to lend to this client, so I added it to the page.

Not sure how best to display the loan, savings, and other data, could be all together in a single table, but I think the amounts and status in columns makes it easier to read.