



MifosX Dash Home

Recent Activities

Create Template	Templates	View Template	View Client
Client Screen Report	Clients	View Client	New Client Loan Acc
New Client Loan Acc			

Frequent Activities

Clients	Tasks	Collection Sheet	Groups
View Client	Create Client	Expert Search	

Demo HOME page



Original Home/
Dashboard Page -
specific to user type.

Loan Officer: Larry Lender

To-Do List

Wed, Jun 12, 2013

- 8:00 Red Hat Ladies at Sacred Heart Elementary
- 9:00 Wisdom Group at Sacred Heart Elementary
- 10:00 Triangle Group at Ganesh Temple
- 11:00 The Singers at Ganesh Temple
- 12:00 Enter collections at Branch Office

My New Clients

June 2013



[New Client](#)

My Delinquency

↓ 2.97%

Miranda Smith	3500
Sindhu Srinivas	2650
Michael Krasny	1800
Joji Sharanpani	1742
Theresa Wang	1689
Portia Vazquez	1510

Collections For:

May 16, 2013



[View Collections](#)

My Portfolio

↑ 130,000



Target 2013

[New Loan](#)

Other Loan Officer Portlet?



Loan Officer: Larry Lender

Use a color other than black for header background. Not sure if this is the right color.

Tasks

[See All](#)

Action	Made On	Product	Client
APPROVE	14-03-31	Car	Sandra Day
CREATE	14-03-24	Emerge...	Manaswi Shuk...
UPDATE	14-03-24	Savings	Rhadika Hada...
ACTIVATE	14-02-21	Standard	Theresa Wang
APPROVE	14-02-07	Savings	Martha Stewart
APPROVE	13-12-05	Standard	Frank Inez

Recent Clients

Client Name	Status	Outstanding
Miranda Smith	■ Active	1,245.00
Sindhu Srinivas	■ Active	856.42
Michael Krasny	■ Pending	
Joji Sharanpani	■ Delinquent	3,425.32
Theresa Wang	■ Transfer	943.22
Portia Vazquez	■ Closed	

Active Loans

[See All](#)

Loan	Client Name	Disbursed	Outstanding
Car	Sandra Day	14-03-31	1,245.00
Emerge...	Manaswi Shuk...	14-03-24	856.42
Business	Rhadika Hada...	14-03-24	753.42
Standard	Theresa Wang	14-02-21	3,425.32
Business	Martha Stewart	14-02-07	1,425.16
Standard	Frank Inez	13-12-05	652.54

Recent Actions

Action	Details
Tasks	All
Checker Inbox	Approve Savings Account
Loan Report	Saved Loan Report
View Loan Account	Justin Hemp / Car Loan
View Client	Frank Inez
View Clients	All

Frequent Actions

Clients
Tasks
Loan Reports
Search
Collection Sheet

Recent Reports

[See All](#)

Report	Type	Category
Active Loans - Details	Table	Loan
Active Loans - Summary	Table	Loan
Aging Detail	Table	Loan
Balance Sheet	Pentaho	Account...
Client Listing	Table	Client
Disbursal vs. Waiting Disbursal	Table	Loan

Idea 1:

Change dashboard portlets to more textual data, but still keeping the general gist of the portlets in the original design.

Make Recent and Frequent Actions another portlet. (Takes up 2 of the 6 slots, but otherwise indistinguishable.)

Loan Officer: Larry Lender

Recent Actions

Create
Template

Templates

View Template
(my template)View Client
(Miranda Smi...)

Clients

New Client Loan
Acct.

Frequent Actions

Create
Template

Templates

Clients

Tasks

Checker
InboxCollection
Sheet

Tasks

[See All](#)

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Active Loans

[See All](#)

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Idea 2: Make Recent and Frequent actions a separate section with buttons. Recent actions refer to a specific page (and shows which one) whereas Frequent actions refer to general pages - the user then has to drill down to specific page.

I'm not crazy about this idea - not particularly visually pleasing. Still not clear what difference between recent and frequent is.



Loan Officer: Larry Lender

Tasks

[See All](#)

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APPROVE	13-12-05	Standard	Frank Inez

Recent Clients

Client Name	Status	Amount
Miranda Smith	Active	
Sindhu Srinivas	Active	
Michael Krasny	Active	
Joji Sharanpani	Active	
Theresa Wang	Transfer	943.22
Portia Vazquez	Closed	

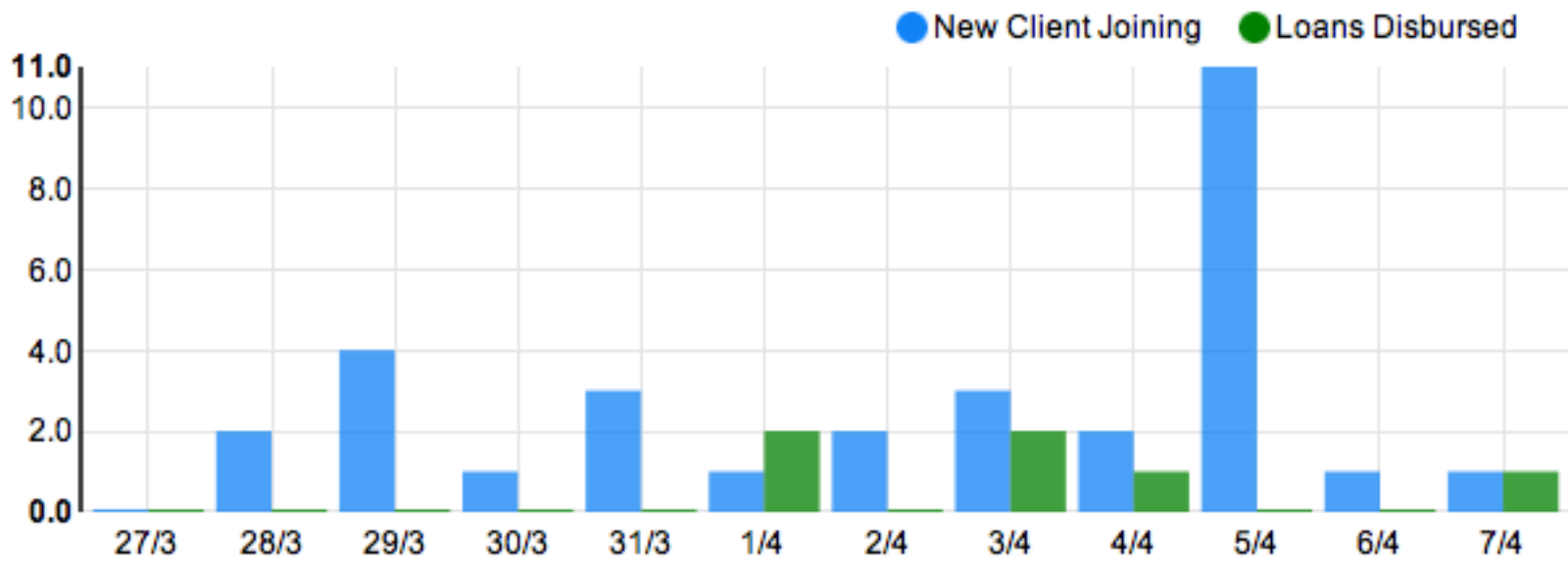
Loans

[See All](#)

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Sandra Day	14-03-31	1,245.00
Manaswi Shuk...	14-03-24	856.42
Rhadika Hada...	14-03-24	753.42
Theresa Wang	14-02-21	3,425.32
Martha Stewart	14-02-07	1,425.16
Frank Inez	13-12-05	652.54

- Clients > Jason Wong > Loan: Emergency Loan
- Clients > Jason Wong
- Clients
- Accounting > Chart of Accounts > Solidaire
- Accounting > Chart of Accounts
- Accounting
- Reports > Loans > Active Loan: Details
- Reports > Loans

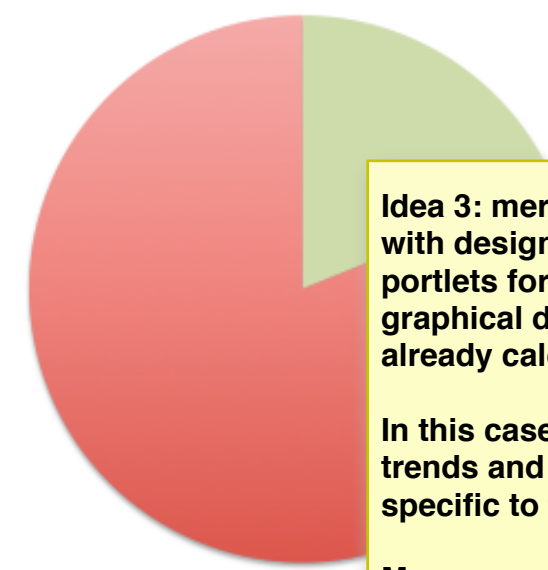
Client/Loan Trends



Day Week Month

Collections for:

Today



Collected: 1,254.67
Pending: 5,246.42

Idea 3: merge demo dashboard with design home page - 3 portlets for actions and 2 for graphical data (that we are already calculating.)

In this case, both the client trends and the collections are specific to the loan officer.

Managers would have access to a menu from which to select a branch to view.

Move Recent and Frequent to a HISTORY menu in the top bar. This list would grow to show all recent actions like Safari history menu.