



### 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
<a href="#">APPROVE</a>	14-03-31	Car	Sandra Day
<a href="#">CREATE</a>	14-03-24	Emerge...	Manaswi Shuk...
<a href="#">UPDATE</a>	14-03-24	Savings	Rhadika Hada...
<a href="#">ACTIVATE</a>	14-02-21	Standard	Theresa Wang
<a href="#">APPROVE</a>	14-02-07	Savings	Martha Stewart
<a href="#">APPROVE</a>	13-12-05	Standard	Frank Inez

### Recent Clients

Client Name	Status	Outstanding
<a href="#">Miranda Smith</a>	Active	1,245.00
<a href="#">Sindhu Srinivas</a>	Active	856.42
<a href="#">Michael Krasny</a>	Pending	
<a href="#">Joji Sharanpani</a>	Delinquent	<b>3,425.32</b>
<a href="#">Theresa Wang</a>	Transfer	943.22
<a href="#">Portia Vazquez</a>	Closed	

### Active Loans [See All](#)

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

### Recent Actions

Action	Details
<a href="#">Tasks</a>	All
<a href="#">Checker Inbox</a>	Approve Savings Account
<a href="#">Loan Report</a>	Saved Loan Report
<a href="#">View Loan Account</a>	Justin Hemp / Car Loan
<a href="#">View Client</a>	Frank Inez
<a href="#">View Clients</a>	All

### Frequent Actions

<a href="#">Action</a>
<a href="#">Clients</a>
<a href="#">Tasks</a>
<a href="#">Loan Reports</a>
<a href="#">Search</a>
<a href="#">Collection Sheet</a>

### Recent Reports [See All](#)

Report	Type	Category
<a href="#">Active Loans - Details</a>	Table	Loan
<a href="#">Active Loans - Summary</a>	Table	Loan
<a href="#">Aging Detail</a>	Table	Loan
<a href="#">Balance Sheet</a>	Pentaho	Account...
<a href="#">Client Listing</a>	Table	Client
<a href="#">Disbursal vs. Waiting Disbursal</a>	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](#)

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

## Recent Clients

Client Name	Status	Outstanding
<a href="#">Miranda Smith</a>	<span style="color: green;">■</span> Active	1,245.00
<a href="#">Sindhu Srinivas</a>	<span style="color: green;">■</span> Active	856.42
<a href="#">Michael Krasny</a>	<span style="color: orange;">■</span> Pending	
<a href="#">Joji Sharanpani</a>	<span style="color: red;">■</span> Delinquent	<b>3,425.32</b>
<a href="#">Theresa Wang</a>	<span style="color: blue;">■</span> Transfer	943.22
<a href="#">Portia Vazquez</a>	<span style="color: black;">■</span> Closed	

## Active Loans

[See All](#)

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

**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](#)

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

#### Recent Clients

Client Name	Status	Amount
<a href="#">Miranda Smith</a>	Active	
<a href="#">Sindhu Srinivas</a>	Active	
<a href="#">Michael Krasny</a>	Active	
<a href="#">Joji Sharanpani</a>	Active	
<a href="#">Theresa Wang</a>	Transfer	943.22
<a href="#">Portia Vazquez</a>	Closed	

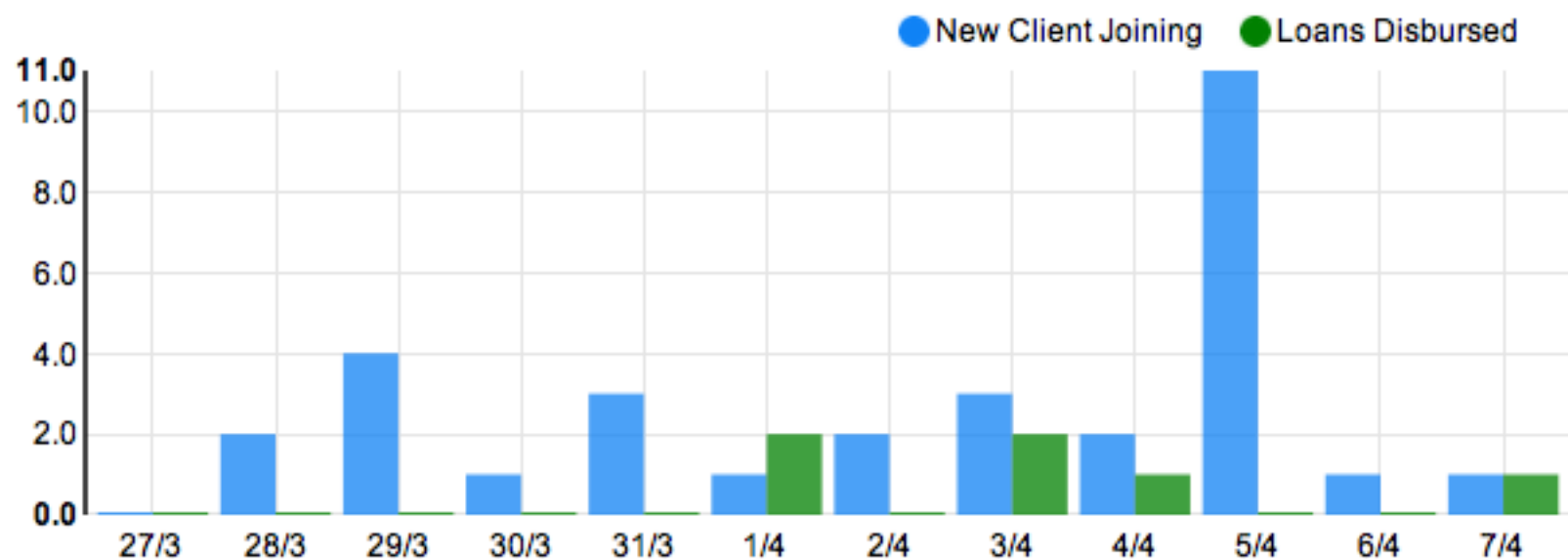
- Clients > Jason Wong > Loan: Emergency Loan
- Clients > Jason Wong
- Clients
- Accounting > Chart of Accounts > Solidaire
- Accounting > Chart of Accounts
- Accounting
- Reports > Loans > Active Loan: Details
- Reports > Loans

#### Loans

[See All](#)

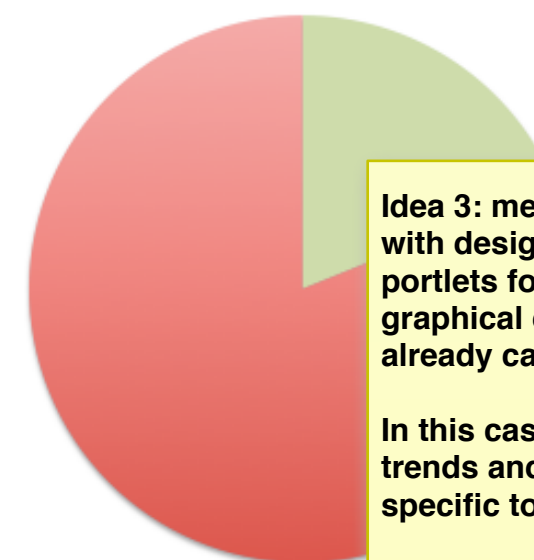
Client Name	Disbursed	Outstanding
Sandra Day	14-03-31	1,245.00
Manaswi Shuk...	14-03-24	856.42
Rhadika Hada...	14-03-24	753.42
Theresa Wang	14-02-21	3,425.32
Martha Stewart	14-02-07	1,425.16
Frank Inez	13-12-05	652.54

#### Client/Loan Trends



#### 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.



### Loan Officer: Larry Lender

Search tasks

#### To Do List

Clients to be activated:	20
Loans to be approved:	30
Loans to be disbursed:	8
Center collections pending for today:	6
Client collections pending for today:	125
Savings to be approved:	10

#### Recent Actions

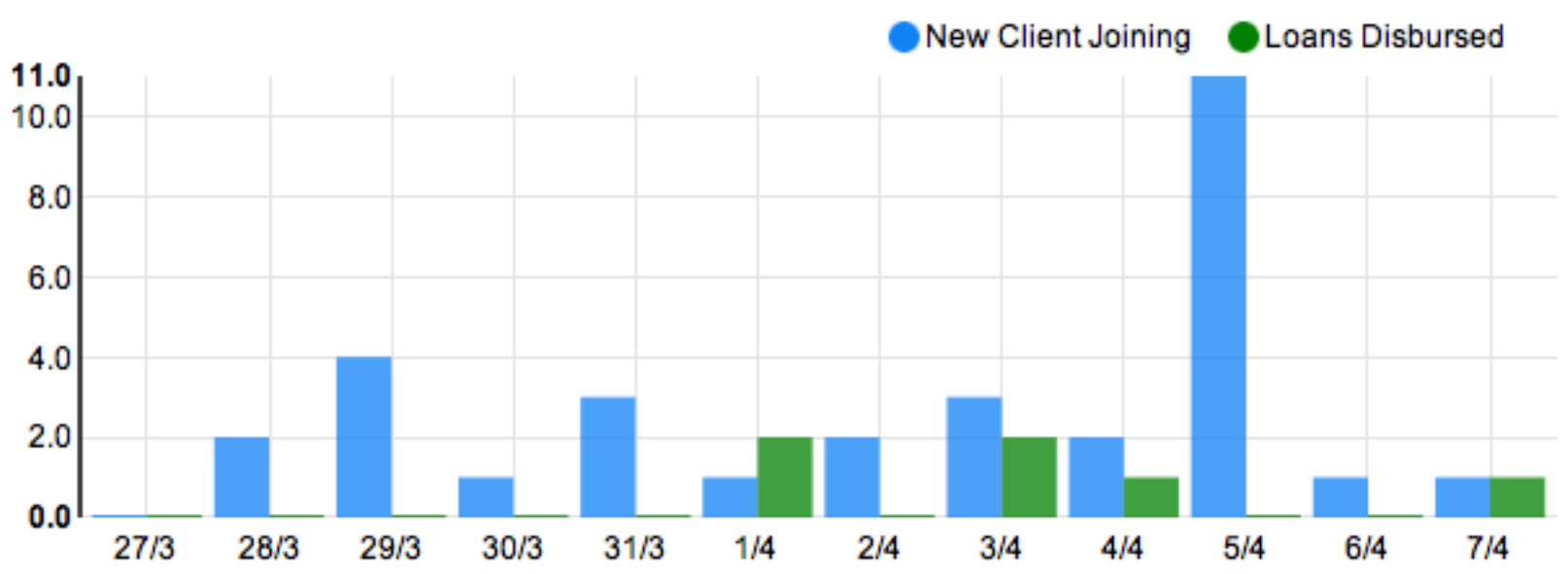
Action	Details
Tasks	All
Checker Inbox	Approve Savings Account
Loan Report	Saved Loan Report
View Loan Account	Justin Hemp / Car Loan
View Client	Frank Inez
View Clients	All

#### Recent Reports

[See All](#)

Report	Type	Category
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<a href="#">Balance Sheet</a>	Pentaho	Account...
<a href="#">Client Listing</a>	Table	Client
<a href="#">Disbursal vs. Waiting Disbursal</a>	Table	Loan

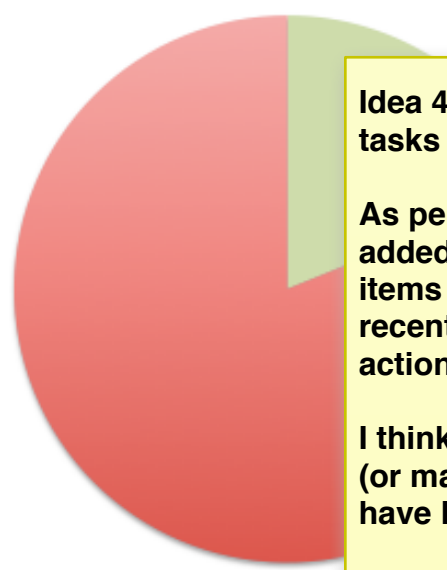
#### Client/Loan Trends



Day Week Month

#### Collections for:

Today



Collected: 1,254.67  
Pending: 5,246.42

**Idea 4: added back in the Search tasks field.**

**As per Binny's suggestion - added a To Do list with a link to items for each task. Put in recent reports and recent actions as portlets.**

**I think we could still keep History (or maybe it isn't necessary if we have Recent Actions port let?)**

**Ideally, the portlets that appear here would be customizable so we could also include the suggestions of My Delinquency and My Portfolio, allowing the user to pick and choose the ones they use most.**