

Loan Wizard Layout Alternatives

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User Experience Designer
June 21, 2013

[Click here to
continue](#)



Loan Officer: Larry Lender

My Common Tasks <<

[My Dashboard](#)

[Enter Collection Sheet Data](#)

[Create New Center](#)

[Create New Group](#)

[Create New Client](#)

[Create Savings Account](#)

[Create Loan Account](#)

[Create Multiple Loan Accounts](#)

Click New Loan to start

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?



New Loan

1. Select Client(s)

2. Select Loan

3. Customize Loan

4. Review

Select a group or client from the lists on the left, or search for clients, groups, or centers that match what you type.

Office:

-- OR --

Group:

- Miranda Group (8)
- Miriam Gonzalez
- Chad Mirthi
- Mirror Temple (35)
- Emirates (8)

Client:

Office filled in for manager, but can be changed. Manager can select a group and/or client.

Or search - typing will auto-fill as seen here.

Click **Group** dropdown to see Group loan
Click **Client** dropdown to see Individual loan

Next is disabled until a valid selection is made.

<< Back Next >> Cancel

New Loan

1. Select Client(s)

2. Select Loan

3. Customize Loan

4. Review

Select a group or client from the lists on the left, or search for clients, groups, or centers that match what you type.

Office: Head Office

-- OR --

Miranda Group (8)

Group: Miranda Group (8)

Client: -- select --

If user selects the search term **Miranda Group**, it is filled in on the drop-down box (to avoid confusion).

Choice is validated with text and the Next button is enabled.

Click Next to continue

Selected: **Mirianda Group (8)**

<< Back Next >> Cancel



New Loan

1. Select Client(s)

2. Select Loan

3. Customize Loan

4. Review

Select a group or client from the lists on the left, or search for clients, groups, or centers that match what you type.

Office: Head Office

-- OR --

search for group or client

Group: Miranda Group (8)

Client: Betty White

User can search for Client name before or after selecting a Group (or can search).

Choice is validated with text and the Next button is enabled.

Click Next to continue

Selected: Betty White

<< Back Next >> Cancel



Loa

Loan

10000

10000

10000

10000

10000

10000

10000

10000

10000

10000

10000

10000

10000

10000

10000

10000

10000

10000

10000

10000

10000

New Loan



✓ Select Client(s)

2. Select Loan

3. Customize Loan

4. Review

Select the loan type.

- Group Loan - create one loan for the entire group.
- Individual Loan - create individual loans for all (or select) clients

Select the loan product.

Loan Product: -- select loan product --

This page defaults to Group loan if selection is a group.

Select individual loan or loan product drop-down to continue

<< Back Next >> Cancel



Loans

New Loan

- ✓ Select Client(s)
- 2. Select Loan**
- 3. Customize Loan
- 4. Review

Select the loan type.

- Group Loan - create one loan for the entire group.
- Individual Loan - create individual loans for all (or select) clients

Select the loan product.

Loan Product: Group Monthly Loan

This page defaults to Group loan if selection is a group.

Click Next to continue

Group Loan: Group Monthly Loan for Mirianda Group (8)

<< Back Next >> Cancel



Loa

Loan

10000

10000

10000

10000

10000

10000

10000

10000

10000

10000

10000

10000

10000

10000

10000

10000

10000

10000

10000

10000

10000

New Loan



✓ Select Client(s)

2. Select Loan

3. Customize Loan

4. Review

Select the loan type.

- Group Loan - create one loan for the entire group.
- Individual Loan - create individual loans for all (or select) clients

Select the loan product.

Loan Product: -- select loan product --

Select loan product drop-down to continue

<< Back

Next >>

Cancel



Loa

New Loan



✓ Select Client(s)

2. Select Loan

3. Customize Loan

4. Review

Select the loan product.

Loan Product:

-- select loan product --

If user chose an individual client on the Select Clients page, this page skips the Group or Individual selection and just asks for a loan product.

<< Back

Next >>

Cancel



Loa

New Loan

- ✓ Select Client(s)
- 2. Select Loan**
- 3. Customize Loan
- 4. Review

Select the loan product.

Loan Product: Standard Loan

Once a loan product is selected, the loan is verified with text and NEXT is enabled.

Standard Loan for Betty White.

<< Back Next >> Cancel



New Loan

- 1. Select Client(s)
- 2. Select Loan**
- 3. Customize Loan
- 4. Review

Select the loan type.

- Group Loan - create one loan for the entire group.
- Individual Loan - create individual loans for all (or select) clients

Select the loan product.

Loan Product: Standard Loan

This page could be shortcut for multiple loans (as in 2.6). If no customizations or review is needed, user could click FINISH now.

<input checked="" type="checkbox"/>	Account Owner	Loan Amount	Allowed Amount	Installments	Loan Purpose
<input checked="" type="checkbox"/>	Ani Ambani	2000	1,000 - 50,000	25	-- Select --
<input checked="" type="checkbox"/>	Ana Flores	2000	1,000 - 50,000	25	-- Select --
<input checked="" type="checkbox"/>	Cherry San Pietro	2000	1,000 - 50,000	25	-- Select --
<input checked="" type="checkbox"/>	Sindhu Srinivas	2000	1,000 - 50,000	25	-- Select --
<input checked="" type="checkbox"/>	Betty White	2000	1,000 - 50,000	25	-- Select --
<input checked="" type="checkbox"/>	Betty White	2000	1,000 - 50,000	25	-- Select --
<input checked="" type="checkbox"/>	Betty White	2000	1,000 - 50,000	25	-- Select --
<input checked="" type="checkbox"/>	Betty White	2000	1,000 - 50,000	25	-- Select --

Individual Loans for 8 people in the Miriam Group.

See page with just client selection

<< Back Next >> Finish Cancel



Loa

New Loan



- ✓ Select Client(s)
- 2. Select Loan**
- 3. Customize Loan
- 4. Review

Select the loan type.

- Group Loan - create one loan for the entire group.
- Individual Loan - create individual loans for all (or select) clients

Select the loan product.

Loan Product: Standard Loan

- Account Owner
- Ani Ambani
- Ana Flores
- Cherry San Pietro
- Sindhu Srinivas
- Betty White
- Betty White
- Betty White
- Betty White

If we aren't going to offer the shortcut for multiple individual loans, this page could just be a selection for individuals.

Individual Loans for 8 people in the Miriam Group.

See page with multi-loan shortcut

<< Back Next >> Cancel

New Loan

✓ Select Client(s)

✓ Select Loan

3. Customize Loan

4. Review

Loan Product

Group Monthly Loan

Group Meeting:

Every Monday
Starting 24 Jun 2013

Office:

Head Office

Loan Officer:

Lorenz Guzman

Group:

Miranda Group

Clients:

6 (of 8)

Loan Terms

Charges

Schedule

Amount:

-- enter amount --

Loan Term:

12 Months

Repaid Every:

1 Months

Interest Rate %:

3 Per Month

Expected Disbursal Date:

-- select date --

Interest charged from:

-- select date --

First repayment on:

-- select date --

Amortization:

Equal Installments

Interest Method:

Declining Balance

Interest calculation period:

Same as repayment period

Arrears tolerance:

3 INR

Repayment strategy:

Mifos Style

Grace Period on principal:

0 Installments

Grace Period on interest:

0 Installments

<< Back

Next >>

Finish

Cancel

New Loan

✓ Select Client(s)

✓ Select Loan

3. Customize Loan

4. Review

Loan Product

Standard Loan

Office: Head Office
Loan Officer: Lorenz Guzman
Group: Miranda Group
Clients: Betty White

Loan Terms

Charges

Schedule

Amount: -- enter amount --

Loan Term: 12 Months

Repaid Every: 1 Months

Interest Rate %: 3 Per Month

Expected Disbursal Date: -- select date --

Interest charged from: -- select date --

First repayment on: -- select date --

Amortization: Equal Installments

Interest Method: Declining Balance

Interest calculation period: Same as repayment period

Arrears tolerance: 3 INR

Repayment strategy: Mifos Style

Grace Period on principal: 0 Installments

Grace Period on interest: 0 Installments

<< Back

Next >>

Finish

Cancel



Loans

Loan Number

- 10000001
- 10000002
- 10000003
- 10000004
- 10000005
- 10000006
- 10000007
- 10000008
- 10000009
- 10000010
- 10000011
- 10000012
- 10000013
- 10000014
- 10000015
- 10000016
- 10000017
- 10000018
- 10000019
- 10000020

New Loan



✔ Select Client(s)

✔ Select Loan

3. Customize Loan

4. Review

Loan Product

Standard Loan

Group Meeting:

Every Monday
Starting 24 Jun 2013

- Sync repayments with meeting
- Sync disbursement date with meeting

Office: Head Office
 Loan Officer: Lorenz Guzman
 Group: Miranda Group
 Clients: 6 (of 8)

Loan Terms

Charges

Schedule

Amount: -- see previous page --
 Loan Term: 12 Months
 Repaid Every: 1 Months
 Interest Rate %: 3 Per Month
 Expected Disbursal Date: -- select date --
 Interest charged from: -- select date --
 First repayment on: -- select date --

Amortization: Equal Installments
 Interest Method: Declining Balance
 Interest calculation period: Same as repayment period
 Arrears tolerance: 3 INR
 Repayment strategy: Mifos Style
 Grace Period on principal: 0 Installments
 Grace Period on interest: 0 Installments

<< Back

Next >>

Finish

Cancel

New Loan

✓ Select Client(s)

✓ Select Loan

3. Customize Loan

4. Review

Loan Product

Group Monthly Loan

Office: Head Office

Group Meeting:

Every Monday
Starting 24 Jun 2013

Loan Officer: Lorenz Guzman

Group: Miranda Group

Clients: 6 (of 8)

Loan Terms

Charges

Schedule

-- select loan fee --

+ Add

⊗ Delete Selected

<input type="checkbox"/>	Charge	Amount	Type	Collected on	Due Date	Frequency
<input type="checkbox"/>	Processing Fee	2	% Amount	Disbursement	Disbursement Date	N/A
<input type="checkbox"/>	Disbursement Fee	100	Flat	Disbursement	Disbursement Date	N/A
<input type="checkbox"/>	Loan Insurance	1	% Amount	Specified Date	-- select date --	Monthly

<< Back

Next >>

Finish

Cancel

Loans

Loan Num

10000001

10000002

10000003

10000004

10000005

10000006

10000007

10000008

10000009

10000010

10000011

10000012

10000013

10000014

10000015

10000016

10000017

10000018

10000019

Active

Festival Loan

100

1000

0

10000020

Active

Emergency Loan

100

1000

100

New Loan

✓ Select Client(s)

✓ Select Loan

3. Customize Loan

4. Review

Loan Product: Standard Loan
Group Meeting: Every Monday
Starting 24 Jun 2013

Office: Head Office
Loan Officer: Lorenz Guzman
Group: Miranda Group
Clients: 6 (of 8)

Loan Terms

Charges

Schedule

-- select loan fee -- Add Delete Selected

Table with 7 columns: Charge, Amount, Type, Collected on, Due Date, Frequency. Rows include Processing Fee, Disbursement Fee, and Loan Insurance.

<< Back

Next >>

Finish

Cancel

Active

Festival Loan

100

1000

0

Active

Emergency Loan

100

1000

100

New Loan

✓ Select Client(s)

✓ Select Loan

3. Customize Loan

4. Review

Loan Product

Standard Loan

Office: Head Office

Loan Officer: Lorenz Guzman

Group: Miranda Group

Client: Betty White

Loan Terms

Charges

Schedule

-- select loan fee --

+ Add

⊗ Delete Selected

<input type="checkbox"/>	Charge	Amount	Type	Collected on	Due Date	Frequency
<input type="checkbox"/>	Processing Fee	2	% Amount	Disbursement	Disbursement Date	N/A
<input type="checkbox"/>	Disbursement Fee	100	Flat	Disbursement	Disbursement Date	N/A
<input type="checkbox"/>	Loan Insurance	1	% Amount	Specified Date	-- select date --	Monthly

<< Back

Next >>

Finish

Cancel

Loans

Loan Num

10000001

10000002

10000003

10000004

10000005

10000006

10000007

10000008

10000009

10000010

10000011

10000012

10000013

10000014

10000015

10000016

10000017

10000018

10000019

10000020

Active

Festival Loan

100

1000

0

Active

Emergency Loan

100

1000

100

Loans

- Loan Num
- 10000001
- 10000002
- 10000003
- 10000004
- 10000005
- 10000006
- 10000007
- 10000008
- 10000009
- 10000010
- 10000011
- 10000012
- 10000013
- 10000014
- 10000015
- 10000016
- 10000017
- 10000018
- 10000019
- 10000020

New Loan

✓ Select Client(s)

✓ Select Loan

3. Customize Loan

4. Review

Loan Product

Group Monthly Loan

Office: Head Office

Group Meeting:

Every Monday
Starting 24 Jun 2013

Loan Officer: Lorenz Guzman

Group: Miranda Group

Clients: 6 (of 8)

Loan Terms

Charges

Schedule

-- select loan fee --

+ Add

✘ Delete Selected

<input type="checkbox"/>	Charge	Amount	Type	Collected on	Due Date	Frequency
<input type="checkbox"/>	Processing Fee	2	% Amount	Disbursement	Disbursement Date	N/A
<input type="checkbox"/>	Disbursement Fee	100	Flat	Disbursement	Disbursement Date	N/A
<input type="checkbox"/>	Loan Insurance	1	% Amount	Specified Date	-- select date --	Monthly
<input type="checkbox"/>	Periodic Fee	100	Flat	Specified Date	-- select date --	Quarterly

<< Back

Next >>

Finish

Cancel

New Loan

✓ Select Client(s)

✓ Select Loan

3. Customize Loan

4. Review

Loan Product

Group Monthly Loan

Office: Head Office

Group Meeting:

Every Monday

Loan Officer: Lorenz Guzman

Starting 24 Jun 2013

Group: Miranda Group

Clients: 8 clients in group

Loan Terms

Charges

Schedule

#	Date	# Days	Disbursement	Principal Due	Balance	Interest Due	Fees	Total Due
0	22 June 2013		10,000.00		10,000.00		100.00	100.00
1	22 July 2013	30		372.16	9,627.84	300.00	0.00	672.16
2	22 Aug 2013	31		383.32	9,244.52	288.84	0.00	672.16
3	22 Sept 2013	31		394.82	8,849.70	277.34	0.00	672.16
4	22 Oct 2013	30		406.67	8,443.03	265.49	0.00	672.16
5	22 Nov 2013	31		418.87	8,024.16	253.29	0.00	672.16
6	22 Dec 2013	30		431.44	7,592.72	240.72	0.00	672.16
7	22 Jan 2014	31		444.38	7,148.34	227.78	0.00	672.16
8	22 Feb 2014	31		457.71	6,690.63	214.45	0.00	672.16
9	22 Mar 2014	28		471.43	6,219.20	200.72	0.00	672.16

<< Back

Next >>

Finish

Cancel

New Loan

✓ Select Client(s)

✓ Select Loan

3. Customize Loan

4. Review

Loan Product

Standard Loan

Office: Head Office

Group Meeting:

Every Monday
Starting 24 Jun 2013

Loan Officer: Lorenz Guzman

Group: Miranda Group

Clients: 6 (of 8) clients

Loan Terms

Charges

Schedule

#	Date	# Days	Disbursement	Principal Due	Balance	Interest Due	Fees	Total Due
0	22 June 2013		10,000.00		10,000.00		100.00	100.00
1	22 July 2013	30		372.16	9,627.84	300.00	0.00	672.16
2	22 Aug 2013	31		383.32	9,244.52	288.84	0.00	672.16
3	22 Sept 2013	31		394.82	8,849.70	277.34	0.00	672.16
4	22 Oct 2013	30		406.67	8,443.03	265.49	0.00	672.16
5	22 Nov 2013	31		418.87	8,024.16	253.29	0.00	672.16
6	22 Dec 2013	30		431.44	7,592.72	240.72	0.00	672.16
7	22 Jan 2014	31		444.38	7,148.34	227.78	0.00	672.16
8	22 Feb 2014	31		457.71	6,690.63	214.45	0.00	672.16
9	22 Mar 2014	28		471.43	6,219.20	200.72	0.00	672.16

<< Back

Next >>

Finish

Cancel

New Loan

✓ Select Client(s)

✓ Select Loan

3. Customize Loan

4. Review

Loan Product

Standard Loan

Office: Head Office

Loan Officer: Lorenz Guzman

Group: Miranda Group

Client: Betty White

Loan Terms

Charges

Schedule

#	Date	# Days	Disbursement	Principal Due	Balance	Interest Due	Fees	Total Due
0	22 June 2013		10,000.00		10,000.00		100.00	100.00
1	22 July 2013	30		372.16	9,627.84	300.00	0.00	672.16
2	22 Aug 2013	31		383.32	9,244.52	288.84	0.00	672.16
3	22 Sept 2013	31		394.82	8,849.70	277.34	0.00	672.16
4	22 Oct 2013	30		406.67	8,443.03	265.49	0.00	672.16
5	22 Nov 2013	31		418.87	8,024.16	253.29	0.00	672.16
6	22 Dec 2013	30		431.44	7,592.72	240.72	0.00	672.16
7	22 Jan 2014	31		444.38	7,148.34	227.78	0.00	672.16
8	22 Feb 2014	31		457.71	6,690.63	214.45	0.00	672.16
9	22 Mar 2014	28		471.43	6,219.20	200.72	0.00	672.16

<< Back

Next >>

Finish

Cancel



Loans

Loan Num

10000001

10000002

10000003

10000004

10000005

10000006

10000007

10000008

10000009

10000010

10000011

10000012

10000013

10000014

10000015

10000016

10000017

10000018

10000019

10000020

New Loan

✓ Select Client(s)

✓ Select Loan

✓ Customize Loan

4. Review

Loan Product

Group Monthly Loan

Office: Head Office

Group Meeting:

Every Monday

Loan Officer: Lorenz Guzman

Starting 24 Jun 2013

Applicant: Miranda Group

<< Back

Next >>

Finish

Cancel

Loans

[New Loan](#)



You have successfully created a new group loan.

[Group Loan #1030004314](#)

Suggested next steps:

[Anything?](#)

Search Loans

Loan Number	Loan Status	Loan Type	Amount	Total Outstanding	Overdue	Another Column?
100000001	Active		1000	12,110	0	
100000002	Withdrawn by applicant	Home Loan	2000	5,210	0	
100000003	Pending approval	Home Loan	1000	32,210	0	
100000004	Active	Car Loan	1500	5,213	500	
100000005	Active in Bad Standing	Car Loan	1500	3,259	3,000	
100000006	Approved	Emergency Loan	100	1000	0	
100000007	Active	Festival Loan	100	700	0	
100000008	Closed (written off)	Festival Loan	100	600	600	
100000009	Active	Business Loan	500	4,540	0	
100000010	Active	Business Loan	500	5,218	0	
100000011	Active	Business Loan	500	3,219	0	
100000012	Pending Approval	Business Loan	1000	3,500	0	
100000013	Active	Business Loan	500	4,211	0	
100000014	Active	Home Loan	5000	34,211	0	
100000015	Active	Home Loan	1000	24,169	0	
100000016	Approved	Car Loan	500	3,400	0	
100000017	Pending approval	Business Loan	400	2,000	0	
100000018	Approved	Business Loan	500	2,000	0	
100000019	Active	Festival Loan	100	1000	0	
100000020	Active	Emergency Loan	100	1000	100	

Loans

[New Loan](#)



You have successfully created multiple loans for the Miranda Group.

New loan accounts with the following IDs have been created:

- #0010001611
- #0010001612
- #0010001613
- #0010001614
- #0010001615

Search Loans

Loan Number	Loan Status			Total Outstanding	Overdue	Another Column?
100000001	Active				12,110	0
100000002	Withdrawn				5,210	0
100000003	Pending approval				32,210	0
100000004	Active	Car Loan	1500	5,213	500	
100000005	Active in Bad Standing	Car Loan	1500	3,259	3,000	
100000006	Approved	Emergency Loan	100	1000	0	
100000007	Active	Festival Loan	100	700	0	
100000008	Closed (written off)	Festival Loan	100	600	600	
100000009	Active	Business Loan	500	4,540	0	
100000010	Active	Business Loan	500	5,218	0	
100000011	Active	Business Loan	500	3,219	0	
100000012	Pending Approval	Business Loan	1000	3,500	0	
100000013	Active	Business Loan	500	4,211	0	
100000014	Active	Home Loan	5000	34,211	0	
100000015	Active	Home Loan	1000	24,169	0	
100000016	Approved	Car Loan	500	3,400	0	
100000017	Pending approval	Business Loan	400	2,000	0	
100000018	Approved	Business Loan	500	2,000	0	
100000019	Active	Festival Loan	100	1000	0	
100000020	Active	Emergency Loan	100	1000	100	

Loans

[New Loan](#)



You have successfully created a new loan for Betty White.
Standard Loan #1030004314

Suggested next steps:
[Anything?](#)

Search Loans

Loan Number	Loan Status	Loan Type	Total Outstanding	Overdue	Another Column?
100000001	Active		12,110	0	
100000002	Withdrawn by applicant	Home Loan	5,210	0	
100000003	Pending approval	Home Loan	32,210	0	
100000004	Active	Car Loan	5,213	500	
100000005	Active in Bad Standing	Car Loan	3,259	3,000	
100000006	Approved	Emergency Loan	1,000	0	
100000007	Active	Festival Loan	700	0	
100000008	Closed (written off)	Festival Loan	600	600	
100000009	Active	Business Loan	4,540	0	
100000010	Active	Business Loan	5,218	0	
100000011	Active	Business Loan	3,219	0	
100000012	Pending Approval	Business Loan	3,500	0	
100000013	Active	Business Loan	4,211	0	
100000014	Active	Home Loan	34,211	0	
100000015	Active	Home Loan	24,169	0	
100000016	Approved	Car Loan	3,400	0	
100000017	Pending approval	Business Loan	2,000	0	
100000018	Approved	Business Loan	2,000	0	
100000019	Active	Festival Loan	1,000	0	
100000020	Active	Emergency Loan	1,000	100	

Loans

[New Loan](#)



You have successfully created a new group loan.

[Group Loan #1030004314](#)

Suggested next steps:

[Anything?](#)

See Alternate view with sidebar Table of Contents

Search Loans

Loan Number	Loan Status	Loan Type	Total	Overdue	Another Column?
100000001	Active		0	12,110	0
100000002	Withdrawn by applicant	Home Loan	2000	5,210	0
100000003	Pending approval	Home Loan	1000	32,210	0
100000004	Active	Car Loan	1500	5,213	500
100000005	Active in Bad Standing	Car Loan	1500	3,259	3,000
100000006	Approved	Emergency Loan	100	1000	0
100000007	Active	Festival Loan	100	700	0
100000008	Closed (written off)	Festival Loan	100	600	600
100000009	Active	Business Loan	500	4,540	0
100000010	Active	Business Loan	500	5,218	0
100000011	Active	Business Loan	500	3,219	0
100000012	Pending Approval	Business Loan	1000	3,500	0
100000013	Active	Business Loan	500	4,211	0
100000014	Active	Home Loan	5000	34,211	0
100000015	Active	Home Loan	1000	24,169	0
100000016	Approved	Car Loan	500	3,400	0
100000017	Pending approval	Business Loan	400	2,000	0
100000018	Approved	Business Loan	500	2,000	0
100000019	Active	Festival Loan	100	1000	0
100000020	Active	Emergency Loan	100	1000	100



New Loan

- 1. **Select Client(s)**
- 2. Select Loan
- 3. Customize Loan
- 4. Review

Select a group or client from the lists on the left, or search for clients, groups, or centers that match what you type.

Office:

Group:

Client:

-- OR --

- Miranda Group (8)**
- Miriam Gonzalez**
- Chad **Mir**thi
- Mirror Temple (35)**
- Emirates (8)**

<< Back Next >> Cancel



New Loan



✓ Select Client(s)

2. Select Loan

3. Customize Loan

4. Review

Select the loan type.

- Group Loan - create one loan for the entire group.
- Individual Loan - create individual loans for all (or select) clients

Select the loan product.

Loan Product: Group Monthly Loan ▼

<< Back

Next >>

Cancel



New Loan

- ✓ Select Client(s)
- ✓ Select Loan
- 3. Customize Loan**
- 4. Review

Loan Product Group Monthly Loan ▼
 Group Meeting: Every Monday
 Starting 24 Jun 2013

Office: Head Office
 Loan Officer: Lorenz Guzman
 Group: Miranda Group
 Clients: 6 (of 8)

Loan Terms

Charges

Schedule

Amount: -- enter amount --
 Loan Term: 12 Months ▼
 Repaid Every: 1 Months ▼
 Interest Rate %: 3 Per Month ▼
 Expected Disbursal Date: -- select date --
 Interest charged from: -- select date --
 First repayment on: -- select date --

Amortization: Equal Installments ▼
 Interest Method: Declining Balance ▼
 Interest calculation period: Same as repayment period ▼
 Arrears tolerance: 3 INR
 Repayment strategy: Mifos Style ▼
 Grace Period on principal: 0 Installments
 Grace Period on interest: 0 Installments

<< Back Next >> Cancel



New Loan



- ✓ Select Client(s)
- ✓ Select Loan
- ✓ Customize Loan

4. Review

Loan Product

Group Monthly Loan

Office: Head Office

Group Meeting:

Every Monday

Loan Officer: Lorenz Guzman

Starting 24 Jun 2013

Applicant: Miranda Group

<< Back

Next >>

Cancel