

2:30

Google



Camera



Advanced T..



Mifos



Google



**First-time Login  
Screen - need  
Mifos instance**

2:30

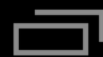


# Mifos

**Mifos Instance:**

**User Name:**

**Password:**



# Login Screen

2:30



# Mifos

<https://demonmifos.org/mifos>

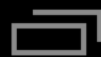
**User Name:**

deanna

**Password:**

\*\*\*\*\*b |

Fields scroll up (and under logo) as lower fields are selected for text entry.



# Loan Officer Dashboard

2:30



Mifos Dashboard

## Clients

Goal for August: 30



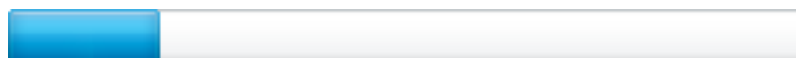
## Portfolio

Goal for 2013: 1,130,000



## Collections

Wed, Aug. 28, 2013



## Delinquency

6 clients behind

↓ 2.97%

## To-Do List

Wed, Aug. 28, 2013

10:00 Triangle Group at Ganesh Temple

11:00 Singer Group at Ganesh Temple

12:00 Enter Collections at Branch Office



# Loan Officer Dashboard with Menu

2:30



Mifos Dashboard

## Clients

Goal for August: 30



## Portfolio

Goal for 2013: 1,130



## Collections

Wed, Aug. 28, 2013



## Delinquency

6 clients behind

↓ 2.97%

## To-Do List

Wed, Aug. 28, 2013

10:00 Triangle Group at Ganesh Temple

11:00 Singer Group at Ganesh Temple

12:00 Enter Collections at Branch Office



Not sure yet what should be in this menu.

**Subsequent Login -  
automatic  
User Name/Pwd in Settings**

2:30

 Mifos Settings

BASICS

Mifos Instance

<https://demomifos.org/mifos>

Login

deanna

Language

English

Text Size

Medium

Other?

settings

ADVANCED


Other?

settings



**Mifos App Page under  
Settings -> Apps**

2:30

 **Mifos**  
version 3.01

Force Stop

Uninstall

Show notifications

STORAGE

|                 |        |
|-----------------|--------|
| Total           | 3.60MB |
| App             | 3.03MB |
| USB storage app | 0.00B  |
| Data            | 356KB  |
| SD card         | 0.00B  |

Clear Data

CACHE

Cache 6.38MB

Clear Cache

**Client List - 1 liner  
Task Icons (no labels)**

2:30

Mifos Clients

Clients

Meetings

Actions

Livia Alvarez

Donia Caballero

Maria Cipriano

Ana Flores

Ben Franklin

Madeline Frau

Ken Hermanson

Kate T. Johnson





**Client List - 1 liner  
Task Icons with labels**

2:30

Clients

Meetings

Actions

Livia Alvarez



Donia Caballero



Maria Cipriano



Ana Flores



Ben Franklin



Madeline Frau



Ken Hermanson



Kate T. Johnson



Add Person



Add Group



Search



Clients Due



Clients In Arrears



**Client List - 2 liner  
Task Icons (no labels)**

2:30

Clients

Meetings

Actions

**Livia Alvarez**

Red Hat Ladies group meets Tues. 9-10am



**Donia Caballero**

Mamba group meets Wed. 10-11am



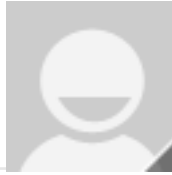
**Maria Cipriano**

Mamba group meets Wed. 10-11am



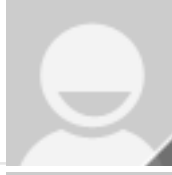
**Ana Flores**

Esperanta group meets Wed. 9-10am



**Ben Franklin**

Kite and Key group meets Thu. 9-10am



**Madeline Frau**

Red Hat Ladies group meets Tues. 9-10am



# Client Search

2:30



an|



Anderson, Jennifer

Anton, Jack

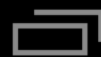
Barry, Anthony

Flores, Ana

Moreno, Anita

Nixon, Anne

Pearson, Andy



# Create New Client

Personal

MFI

Questions

## New Client

Account No:

External ID:

Activation Date:  

Office:

Group

Loan Officer:

Given Name:

Family Name:

Government ID:

Salutation:

Date of Birth  

Gender

Cancel

Save

Tabs same as in web client.

Auto assigns number

Today's date

Loan officer's office

# Client Page

2:30

Mifos Client - Alvarez

Clients

Meetings

Actions

Tabs allow navigation to meetings and actions.

**Livia Alvarez** PPI - 2.45  
Account No: 200152006  
External ID: 532921843  
Activation Date: 02 April 2012  
Office: Bangalore  
Group: Triangle Group  
Loan Officer: Lorenz Guzman  
Loan Cycle: 2



Standard Client Loan #001...562  
-11,356.2



Click HERE for Alternate

Home Loan #0012031092  
--8,245.0



Car Loan #0012020099  
--2,000.0



Mandatory Savings #002...128  
--2,000.0



Edit



New Loan



Search



Questions



Notes

Questions and Notes as an action button. Perhaps replace Search with Additional Info (next page)

**Client Page w  
Additional Info as Action**

2:30

Mifos Client - Alvarez

Clients

Meetings

Actions

**Livia Alvarez**      PPI - 2.45  
Account No:      200152006  
External ID:      532921843  
Activation Date:      02 April 2012  
Office:      Bangalore  
Group:      Triangle Group  
Loan Officer:      Lorenz Guzman  
Loan Cycle:      2



Standard Client Loan #001...562  
-11,356.2



Home Loan      #0012031092  
--8,245.0



Car Loan      #0012020099  
--2,000.0



Mandatory Savings #002...128  
--2,000.0



Edit



New Loan



Additional  
Info



Questions



Notes

Instead of search, we could put Add Info here. To search, go back to Clients

# Client Page w Tabs

2:30

Mifos Client - Alvarez

Client Info    Questions    Notes    Additional Info

**Livia Alvarez**    PPI - 2.45  
Account No: 200152006  
External ID: 532921843  
Activation Date: 02 April 2012  
Office: Bangalore  
Group: Triangle Group  
Loan Officer: Lorenz Guzman  
Loan Cycle: 2



Standard Client Loan #001...562  
-11,356.2



Home Loan    #0012031092  
--8,245.0



Car Loan    #0012020099  
--2,000.0



Mandatory Savings #002...128  
--2,000.0



Edit



Search



New Loan

Or make tabs here and only actions at the bottom. (This might be more correct.)

[Click HERE for Alternate](#)



# Question Groups List

2:30

Mifos Client - Alvarez

Client Info   Questions   Notes   Additional Info

Livia Alvarez   PPI - 2.45



## Client's Voter ID

What is the household's principal occupation?  
Farming

## Miscellaneous

Spouse's Date of Birth  
13 May 1967

Mother's maiden name  
Singh



Edit

I'm not sure I really understand the organization of this info.

Do we want to allow them to edit additional info here?



# Question Groups List

2:30

Mifos Client - Alvarez

Client Info

Questions

Notes

Additional Info

Livia Alvarez PPI - 2.45



PPI Survey Philippines  
26 Oct 2012



Kay's Survey  
4 Feb 2011



Add Question Group



## Specific Question Group View

2:30



Mifos Client - Alvarez

Client  
Info

Questions

Notes

Additional  
Info

Livia Alvarez      PPI - 2.45



### PPI Survey Philippines

26 Oct 2012

How many people in the household aged 0-14?

2

Do all the children in the family of ages 6-14 go to school?

Yes

What is the education level of the female/head spouse?

First to fourth year secondary

Do any family members have salaried employment?

No

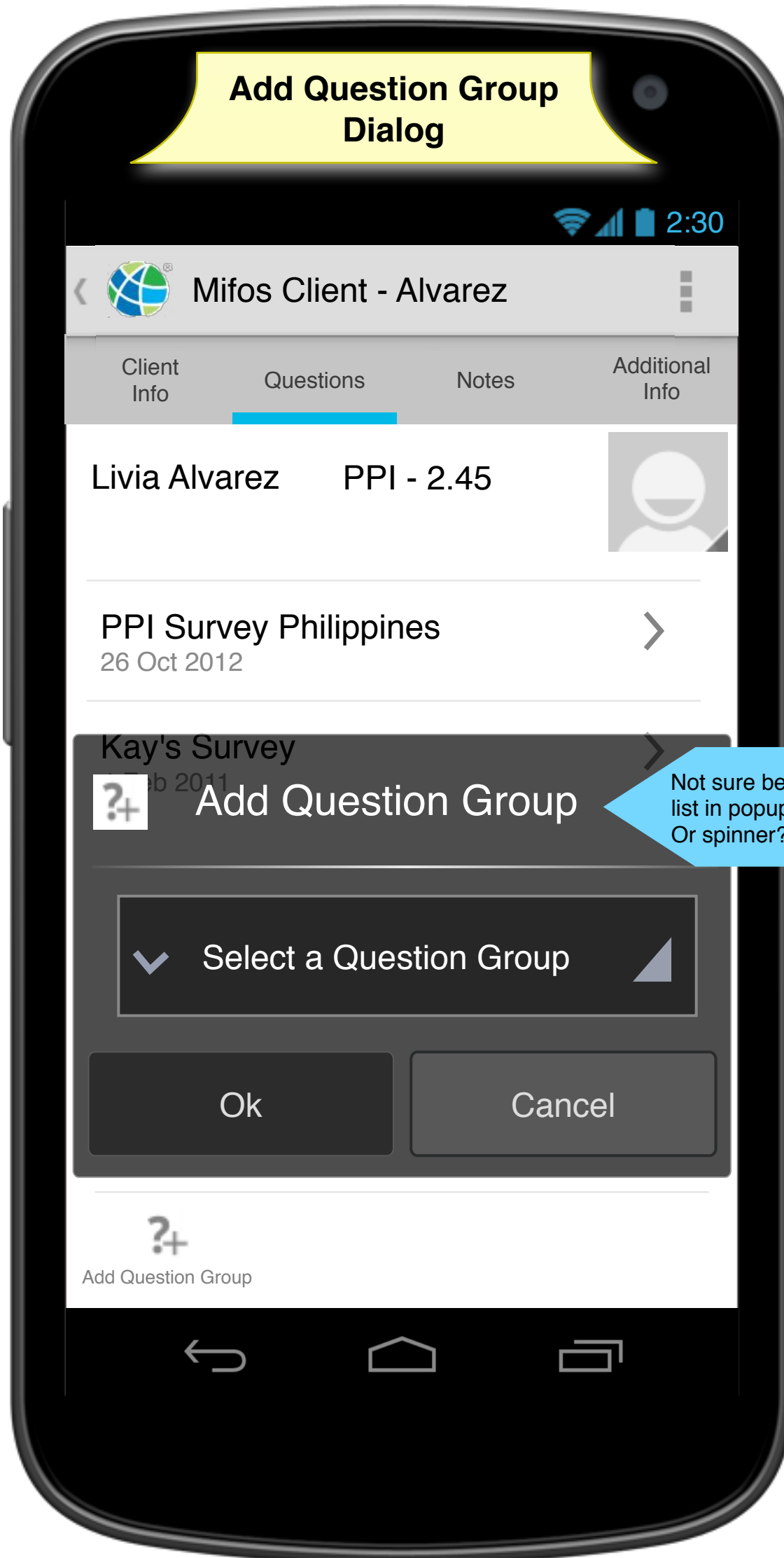
What are the house's outer walls made of?



Edit

Do we want to allow them to edit questions here?

## Add Question Group Dialog



Not sure best way to handle long list in popup. Menu with arrow? Or spinner? See next two images

[Click HERE for Alternate](#)

## Add Question Group Menu

2:30

Client Business Information

Kay's Survey

PPI Survey Kenya

PPI Survey India 2013

PPI Survey India 2012

PPI Survey Nepal

PPI Survey Philippines

PPI Survey Russia



This is menu with arrow. Appears on top of dialog on previous page. To see more items, touch arrow.

Add Question Group



# Add Question Group as Spinner

2:30

Mifos Client - Alvarez

Client Info Questions Notes Additional Info

Livia Alvarez PPI - 2.45



PPI Survey Philippines  
26 Oct 2012



## Select a Question Group



Client Business Information

PPI Survey Philippines

PPI Survey India 2013



Cancel

Add

Click [HERE](#) for Alternate

Menu using a spinner. This may get tedious if this is a long list.

# Client Edit

Mifos Client - Alvarez

Personal

MFI

Questions

Livia Alvarez PPI - 2.45



Account No: 200152006

External ID: 532921843

Activation Date: 02 April 2012

Office: Bangalore

Group: Triangle Group

Loan Officer: Lorenz Guzman

Given Name: Livia

Family Name: Alvarez

Government ID: 10429124221

Salutation: Mrs.

Date of Birth: 16 Feb 1965

Gender: female

Cancel

Save

Tabs same as in web client.

User swipes up to view rest of fields.

# Photo Menu

2:30

Mifos Client - Alvarez

Personal

MFI

Questions

Livia Alvarez PPI - 2.45

Remove photo

Take new photo

Select new photo from Gallery

Account

External

Activatio

Office:

Group

Loan Officer:

Lorenz Guzman

Given Name:

Livia

Family Name:

Alvarez

Government ID:

10429124221

Salutation:

Mrs.

Date of Birth

16 Feb 1965

Gender

female

Cancel

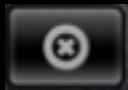
Save



Camera

Photo Edit  
(Camera App)

2:30



CANCEL





**Client with  
New Photo**

2:30

Mifos Client - Alvarez

Personal

MFI

Questions

Livia Alvarez PPI - 2.45



Account No: 200152006

External ID: 532921843

Activation Date: 02 April 2012

Office: Bangalore

Group: Triangle Group

Loan Officer: Lorenz Guzman

Given Name: Livia

Family Name: Alvarez

Government ID: 10429124221

Salutation: Mrs.

Date of Birth: 16 Feb 1965

Gender: female

User swipes up to view rest of fields.

Cancel

Save

# Client Page

2:30

Mifos Client - Alvarez

Clients

Meetings

Actions

**Livia Alvarez**

**PPI - 2.45**



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

Standard Client Loan #001...562  
-11,356.2



Home Loan #0012031092  
--8,245.0



Car Loan #0012020099  
--2,000.0



Mandatory Savings #002...128  
--2,000.0



Edit



New Loan



Search



Questions



Notes



**Client Loan Page  
Pending Approval**

2:30

Mifos Client - Alvarez

Clients

Meetings

Actions

Livia Alvarez



Car Loan  
--2,000.0

#0012020099



Pending Approval

Disbursal Date: 5/31/2013  
Loan Officer: Larry Lender



| Account Summary | Original Loan | Amount Paid | Loan Balance |
|-----------------|---------------|-------------|--------------|
| Principal       | 2,000         | 0           | 2,000        |
| Interest        | 21            | 0           | 718.3        |
| Fees            | 0             | 0           | 0            |
| Penalty         | 0             | 0           | 0            |
| Total           | 2,021         | 0           | 2718.3       |



Approve



# Client Loan Page Active Loan

2:30

Mifos Client - Alvarez

Clients

Meetings

Actions

Livia Alvarez



Standard Client Loan #001...562  
-11,356.2



Active in Bad Standing

In Arrears: 1,256

Loan Officer: Larry Lender



| Account Summary | Original Loan | Amount Paid | Loan Balance |
|-----------------|---------------|-------------|--------------|
| Principal       | 12,000        | 411         | 11,532.9     |
| Interest        | 321           | 21          | 0            |
| Fees            | 0             | 100         | 0            |
| Penalty         | 0             | 0           | 0            |
| Total           | 12,321        | 532         | 11,532.9     |

  
Make Payment



# Client Page

2:30

Mifos Client - Alvarez

Clients

Meetings

Actions

**Livia Alvarez**

**PPI - 2.45**



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

Loan Type: Client Loan

Loan Product: Standard Loan

### Loan Terms

Amount: 10,000.0

Loan Term: 12 Months

Repaid Every: 1 Months

Interest Rate %: 3 Per Month

Cancel

Create Loan

**Loan Officer  
To-Do List**

2:30

 Mifos Clients

Clients

Meetings

Actions

Monday, September 9, 2013

8-9 am Sacred Heart Elementary | >  
Red Hat Ladies

9-10 am Sacred Heart Element... | >  
Wisdom Group

10-11 am Ganesh Temple | >  
Triangle Group

11-12 pm Ganesh Temple | >  
The Singers

12 pm Enter Collections | >



**Loan Officer  
To-Do List**

2:30

 Mifos Clients

Clients

Meetings

Actions

Monday, September 9, 2013

8-9 am Sacred Heart Elementary | >  
Red Hat Ladies

9-10 am Sacred Heart Element... | >  
Wisdom Group

10-11 am Ganesh Temple | >  
Triangle Group

11-12 pm Ganesh Temple | >  
The Singers

Choose a meeting to enter collections  
for that meeting, or change the date.



# Loan Officer Actions List

2:30



Mifos Clients

Clients

Meetings

Actions

Monday, September 9, 2013



Enter Collections



Monitor Delinquency



Create New Clients



Create New Groups



Create New Loan





Change date of  
To-Do List

2:30

Mifos Clients

Clients

Meetings

Actions

Monday, September 9, 2013

8-9 am Sacred Heart Elementary | >  
Red Hat Ladies

9-10 am Sacred Heart Element... | >

Set date

Aug

08

2012

Sept

09

2013

Oct

10

2014

Cancel

Set



# Client List for specified Meeting

2:30

The Singers, Mon. 8/9/13

Clients

Meetings

Actions

Livia Alvarez

Due: 123



Donia Caballero

Due: 469



Maria Cipriano

Due: 78



Ana Flores

Due: 145



Ben Franklin

Due: 317



Madeline Frau


Due: 511

Overdue: 216



# Client Payment

2:30

<  The Singers, Mon. 8/9/13

Clients

Meetings

Actions

< Livia Alvarez



Standard Client Loan #001...562  
-11,356.2



Repayment Date: Aug. 9, 2013

Payment Type: Cash

Amount: 123.0

Additional Pmt: 0.0

Fees: 0.0

Total: 123.0


Cancel

Pay Now



**Add these payments to  
collection sheet**

2:30

 The Singers, Mon. 8/9/13

Clients

Meetings

Actions

Livia Alvarez

Due: 123

Due:

Other:

Donia Caballero

Due: 469

Due:

Other:

Maria Cipriano

Due: 78

Due:

Other:

Ana Flores

Due: 145

Due:

Other:

Ben Franklin

Due: 317

Due:

Other:

Madeline Frau

Due: 511 **Overdue: 216**

Due:

Other:

Total Collected:

**1,860.0**

Pay Now



**Add these payments to  
collection sheet**

2:30

The Singers, Mon. 8/9/13

Clients

Meetings

Actions

Livia Alvarez

Due: 123

ADM:

Other:

Donia Caballero

Due: 469

LTL:

SA:

Other:

Ana Flores

Due: 145

ADM 3:

LTL:

Other:

Ben Franklin

Due: 317

MS1:

Other:

Madeline Frau

Due: 511 **Overdue: 216**

DCF:

Other:

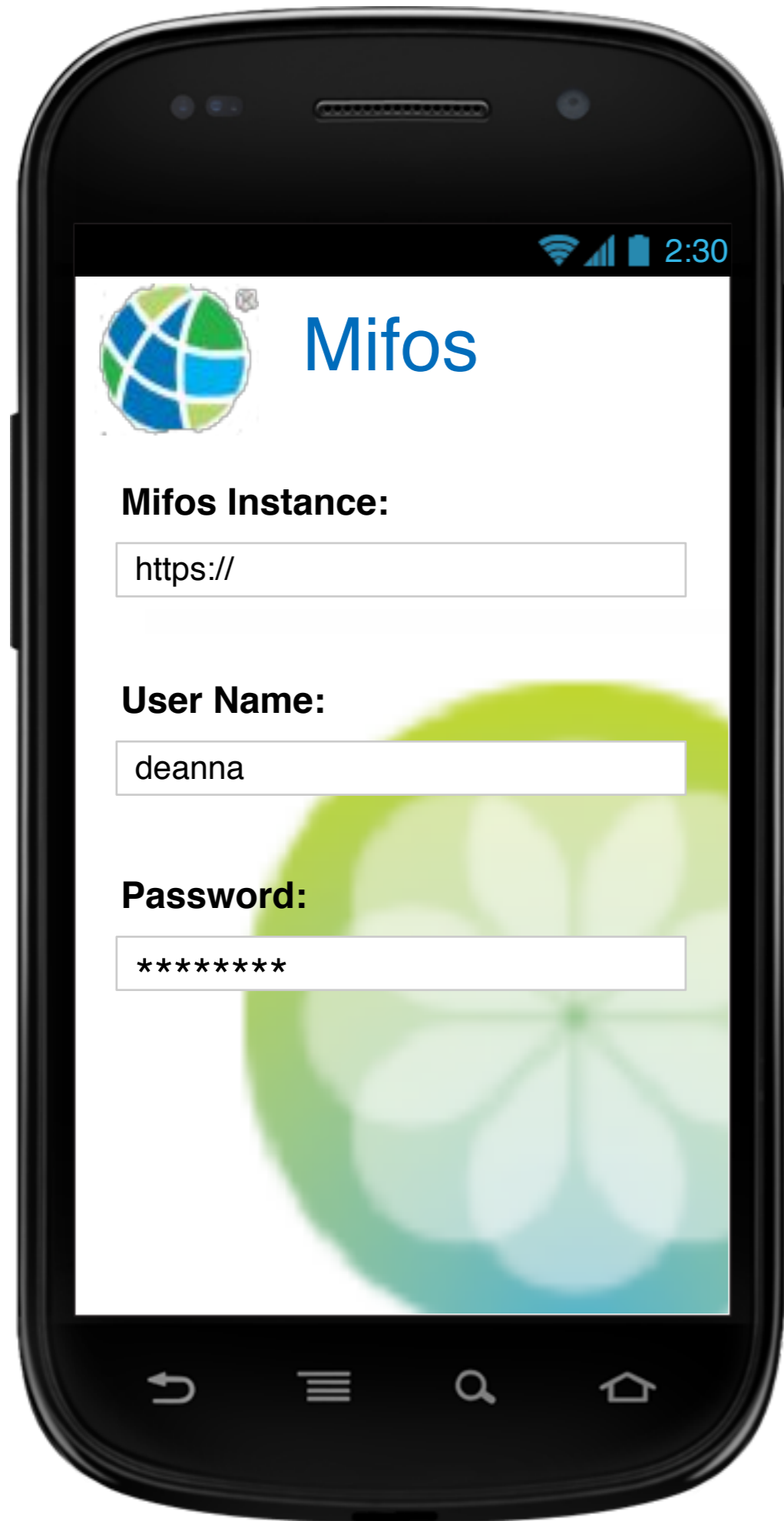
Total Collected:

**1,782.0**

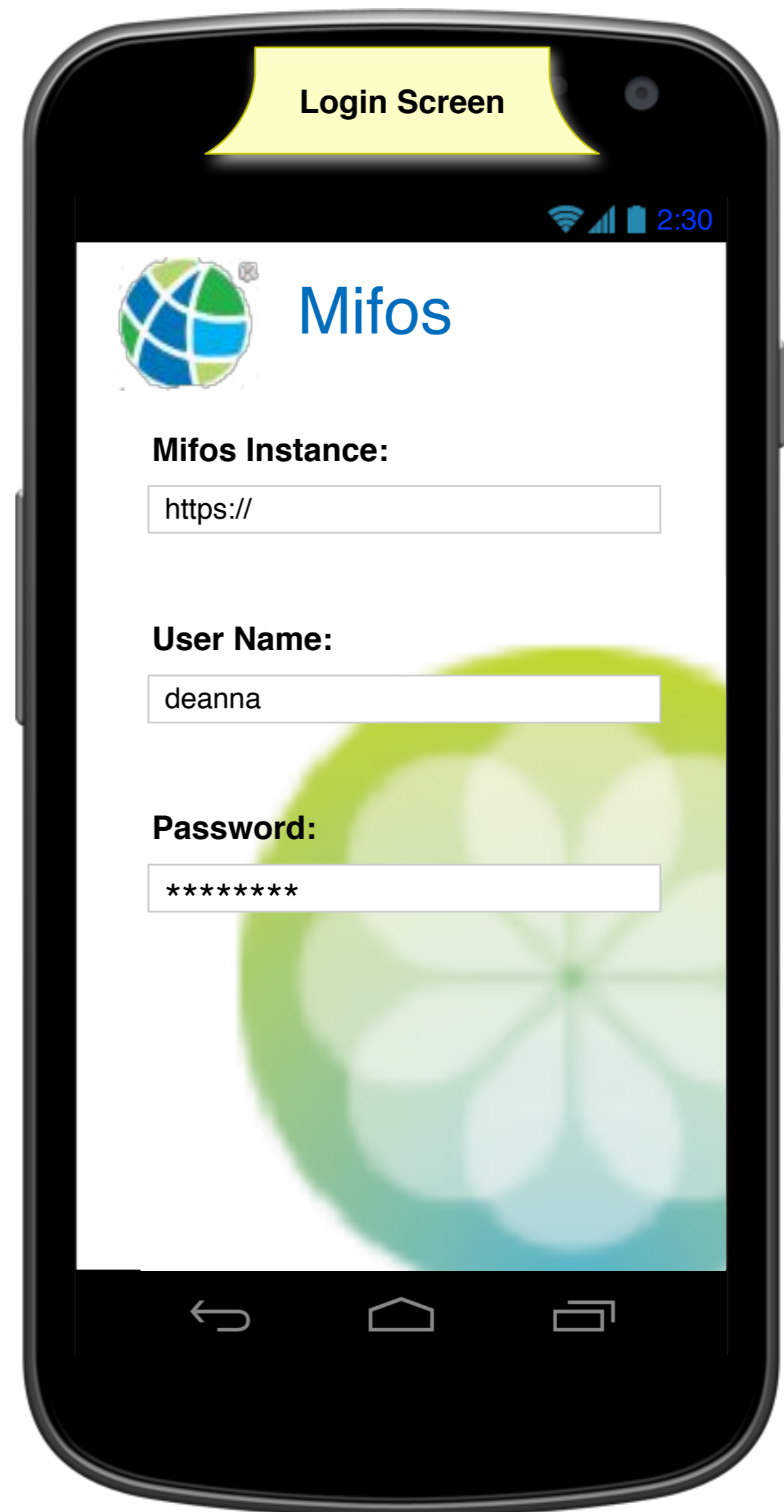
Pay Now

Can collection  
sheet be added to  
at each meeting this  
way?

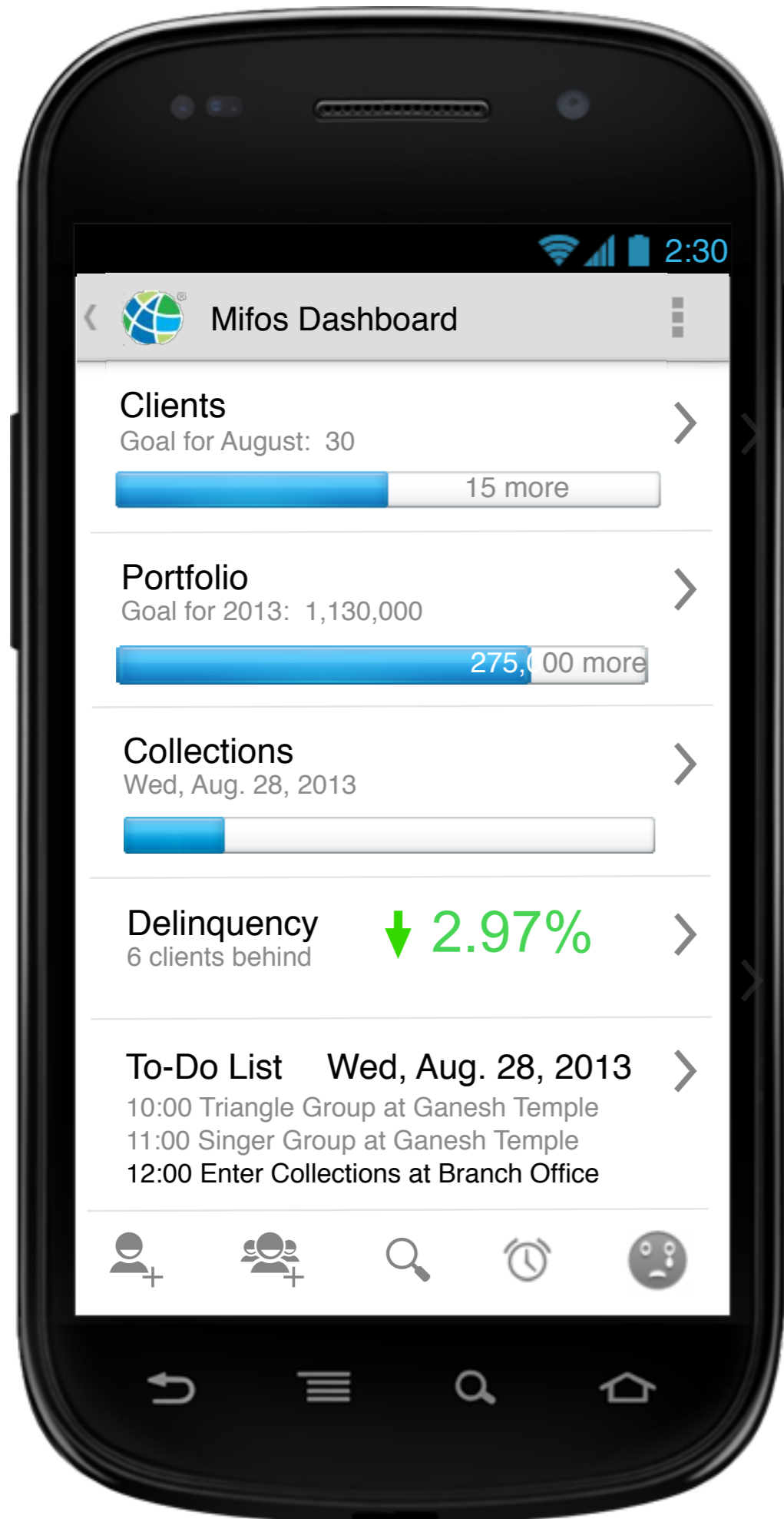
Smaller Screen Size



Fields narrower,  
spaced closer  
together

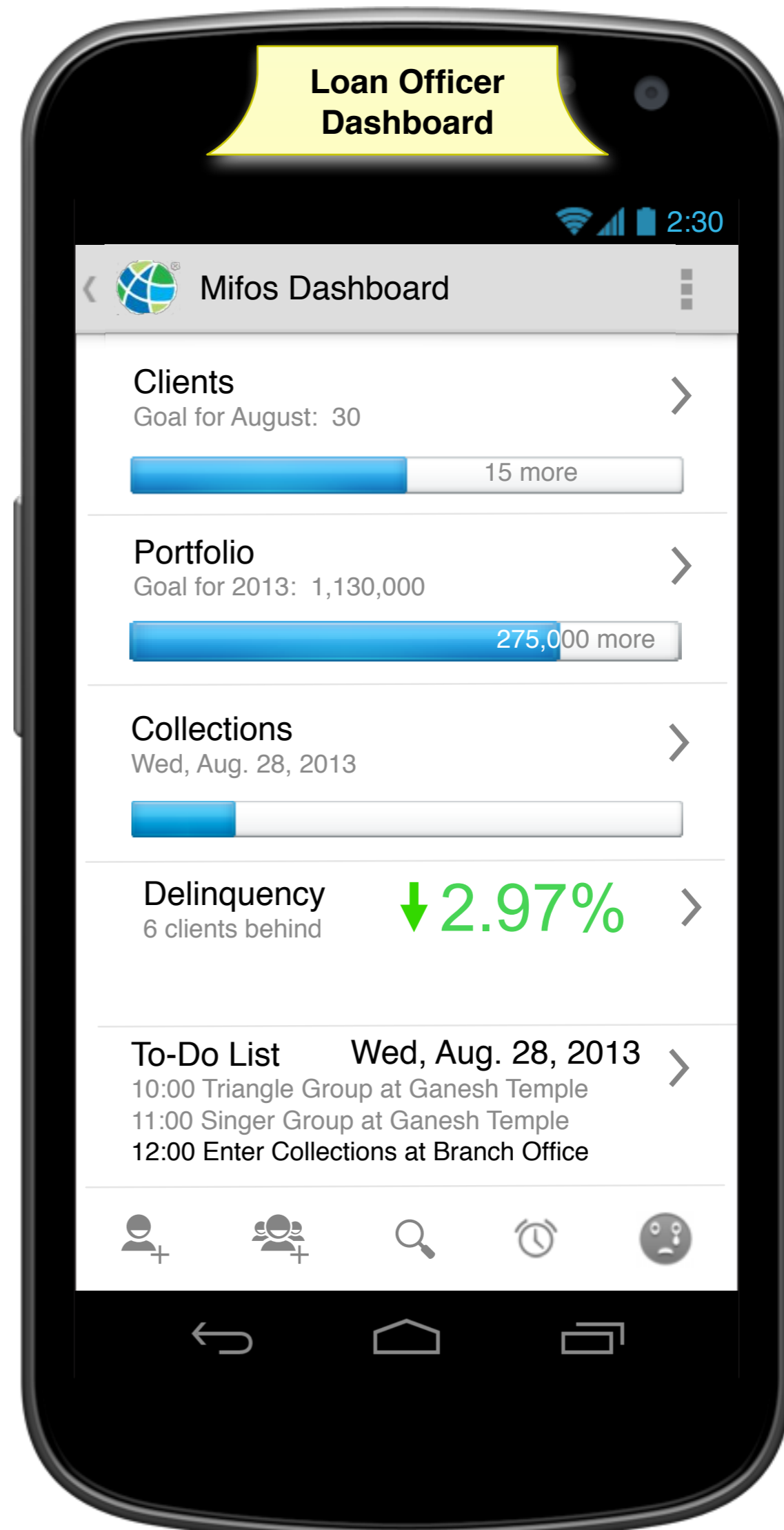


## Smaller Screen Size

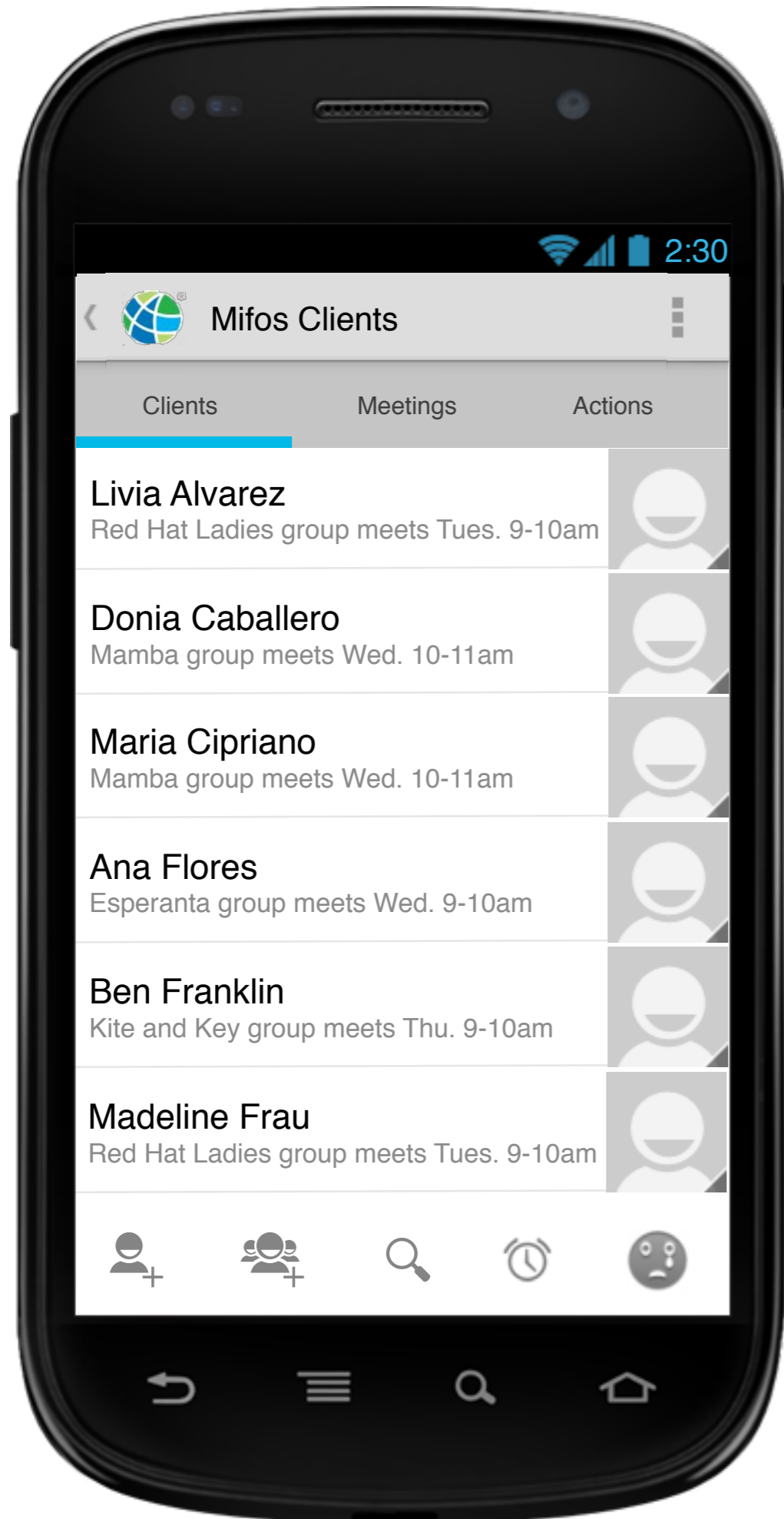


Font size is 1 pt smaller

Icons closer together but same size

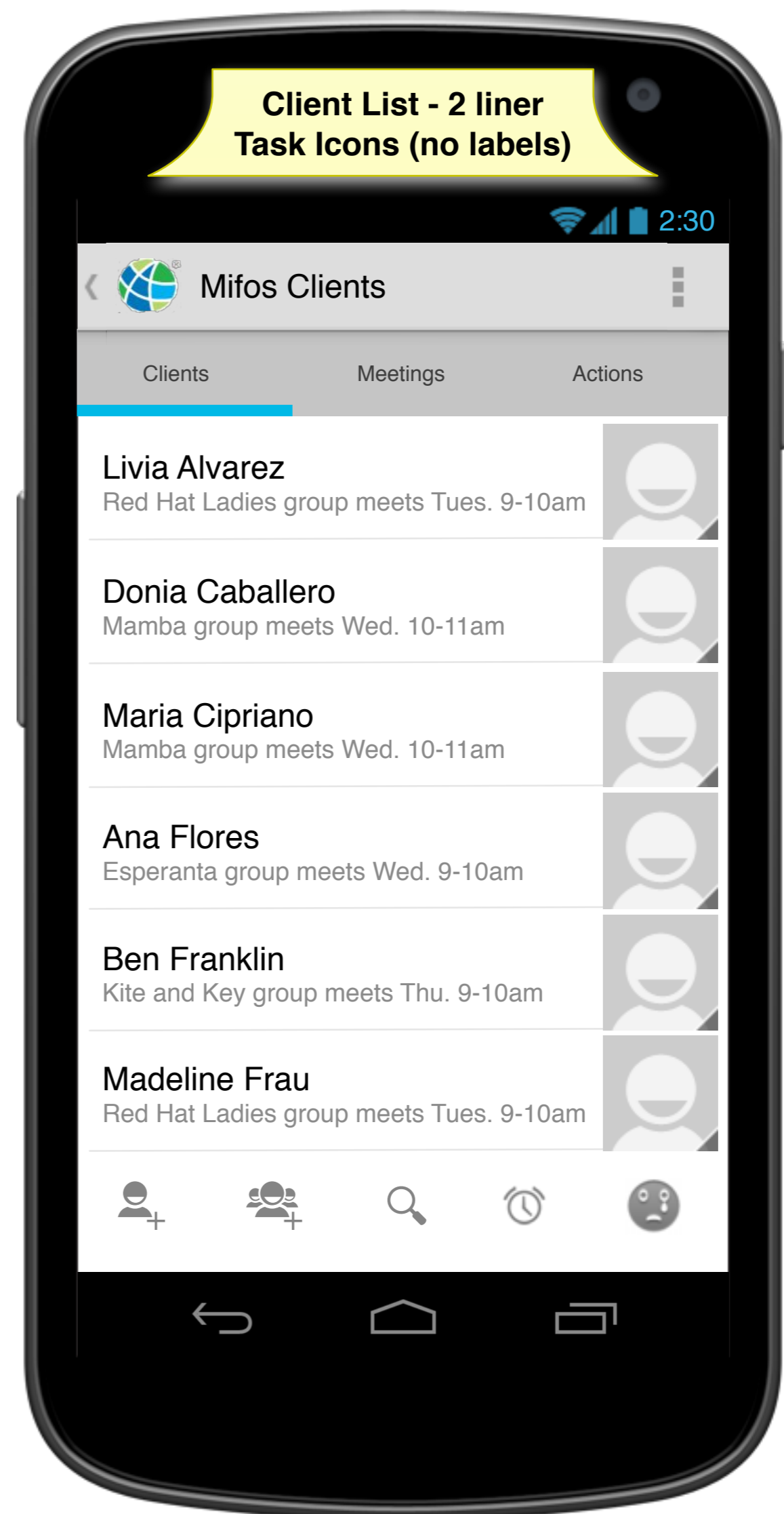


## Smaller Screen Size



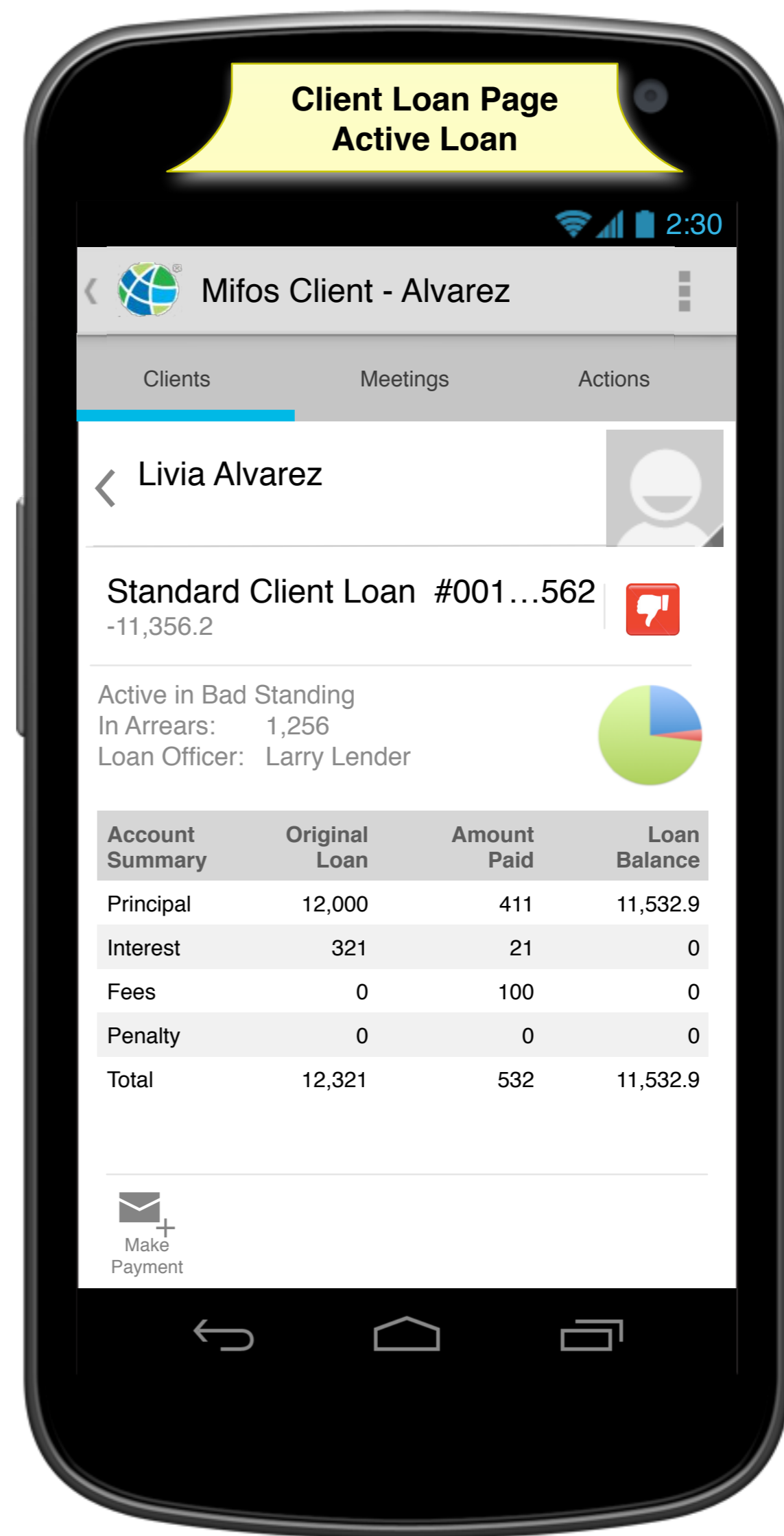
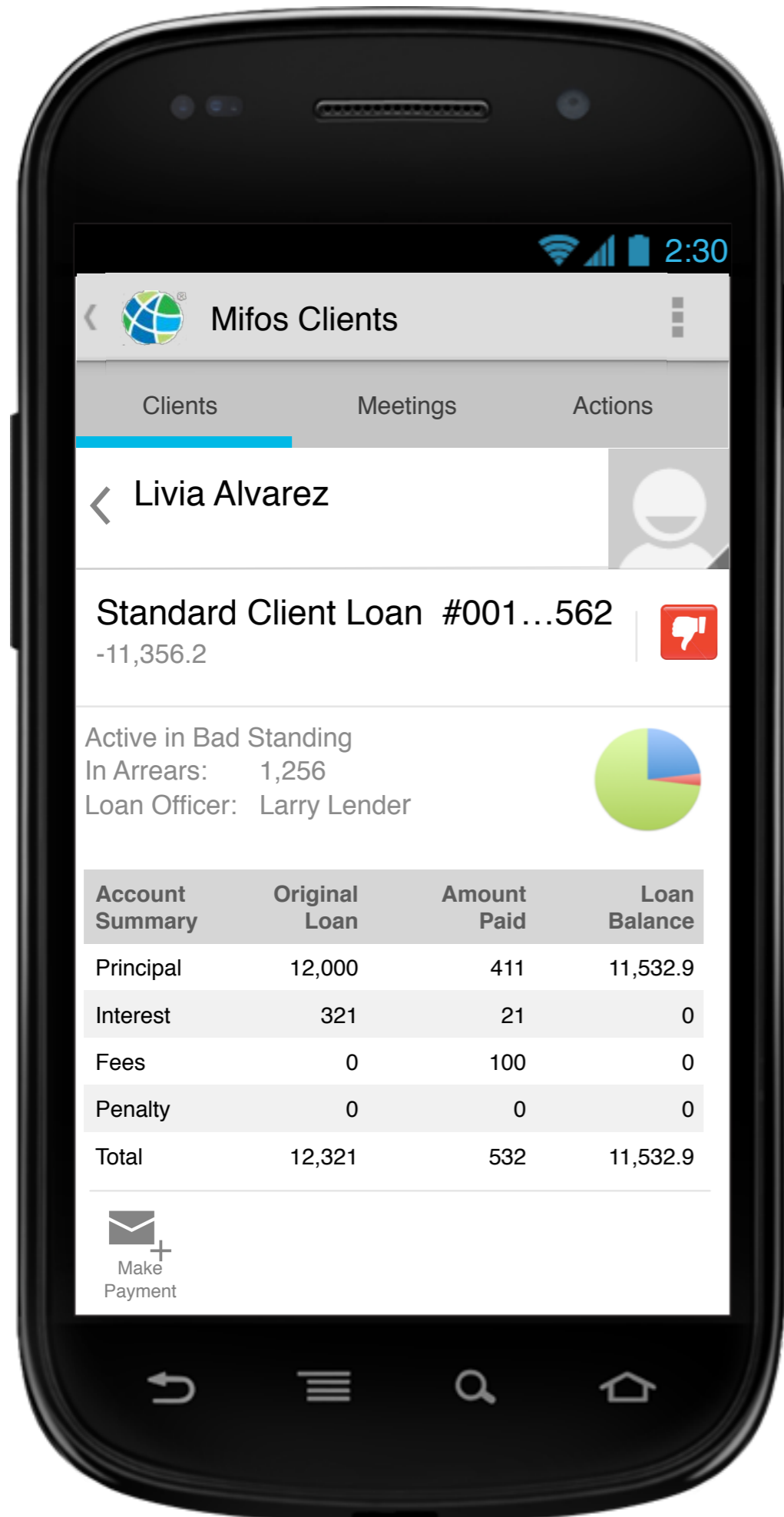
Font size is 1 pt smaller

Icons closer together but same size





Smaller Screen Size



**Extra Icons**

