



Branch Manager: Maria Manager

Loans Pending Approval

34

[Approve Loans](#)

To-Do List

May 16, 2013

- [Approve Loans](#) 34
- [End of Month Closing](#)
- [Active Loans Summary](#)
- [MFI Performance](#)

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

82% complete

[View Collections](#)

Portfolio

↑ 2,130,000

Target 2013

[New Loan](#)

New Clients

May 2013

15 more

[New Client](#)



Branch Manager: Maria Manager

Loans Pending Approval

34

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To-Do List

May 16, 2013

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Delinquency

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| Theresa Wang | 1689 |
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Collections For:

May 16, 2013

82% complete

[View Collections](#)

Portfolio

↑ 2,130,000



Target 2013

[New Loan](#)

New Clients

May 2013

15 more

[New Client](#)

Notifications

[See All](#)



[Larry Lender](#) has sent you a reminder to approve his loan.

Go to: [#0012020099](#)

Go to: [Approve Loans](#)

5 min ago



[Another Lender](#) has created a new loan. Please check and validate.

Go to: [#0012020105](#)

12 hours ago



Branch Manager: Maria Manager

Loans Pending Approval

34

Approve Loans

To-Do List

May 16, 2013

Notifications



Larry Lender has sent you a reminder to approve his loan.

Go to: [#0012020099](#)
Go to: [Approve Loans](#)

5 min ago



Another Lender has created a new loan. Please check and validate.

Go to: [#0012020105](#)

12 hours ago



Larry Lender has submitted the collection sheet for 5/30/2013.

1 day ago



Sys Admin has created a new user. Please approve.

1 day 2 hours ago

6 notifications

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

82% complete

View Collections

New Clients

May 2013

15 more

New Client

Main content area (currently blank)



INDIVIDUAL LENDING
TENANT: DEFAULT



Username:



Password:

Logon



Branch Manager: Maria Manager

Loans Pending Approval

34

Approve Loans

To-Do List

May 1

- Approve Loans 34
- End of Month Closing
- Active Loans Summary
- MFI Performance

Actions

Enter Collection Sheet Data

View Collections

Clients

Collette Morrissey

Loan Products

College Tuition

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

↓ 2.97%

Collections For:

May 16, 2013

82% complete

View Collections

Portfolio

↑ 2,130,000

New Loan

Target 2013

New Clients

May 2013

15 more

New Client

Alternative Search Menu

- Action: Enter Collection Sheet Data
- Action: View Collections
- Client: Collette Morrissey
- Loan Product: College Tuition

- All
- Clients
- Loans
- Reports
- Action

Branch Manager: Maria Manager

Loans Pending Approval

34

[Approve Loans](#)

To-Do List

May 16, 2013

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Delinquency

↓ 2.97%

| | |
|---------------------------------|------|
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Collections For:

May 16, 2013

82% complete

[View Collections](#)

Portfolio

↑ 2,130,000

Target 2013

[New Loan](#)

New Clients

May 2013

15 more

[New Client](#)

- English
- French
- Spanish
- Spanish (Peru)
- Portuguese
- Chinese

Branch Manager: Maria Manager

Loans Pending Approval

34

Approve Loans

To-Do List

May 16, 2013

- Approve Loans 34
- End of Month Closing
- Active Loans Summary
- MFI Performance

Delinquency

↓ 2.97%

| | |
|-----------------|------|
| Miranda Smith | 3500 |
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| Joji Sharanpani | 1742 |
| Theresa Wang | 1689 |
| Portia Vazquez | 1510 |

Collections For:

May 16, 2013

82% complete

View Collections

Portfolio

↑ 2,130,000

Target 2013

New Loan

New Clients

May 2013

15 more

New Client



- Users
- Organisation
- System

Branch Manager: Maria

Loans Pending Approval

34

[Approve Loans](#)

To-Do List

May 16, 2013

- [Approve Loans](#) 34
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Delinquency

↓ 2.97%

| | |
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Collections For:

May 16, 2013

82% complete

[View Collections](#)

Portfolio

↑ 2,130,000

Target 2013

[New Loan](#)

New Clients

May 2013

15 more

[New Client](#)



Branch Manager: Maria Manager

Loans Pending Approval

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Delinquency

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Collections For:

May 16, 2013

82% complete

[View Collections](#)

Portfolio

↑ 2,130,000

Target 2013

[New Loan](#)

New Clients

May 2013

15 more

[New Client](#)



Settings

Account

Display

Other

Other

Dashboard Display

What components do you want to see on your dashboard?

- | | | |
|---|--|--------------------------------|
| <input checked="" type="checkbox"/> To-Do List | <input checked="" type="checkbox"/> Portfolio Progress | <input type="checkbox"/> Other |
| <input checked="" type="checkbox"/> Clients in Arrears List | <input checked="" type="checkbox"/> New Clients Progress | <input type="checkbox"/> Other |
| <input checked="" type="checkbox"/> Collections Progress | <input checked="" type="checkbox"/> Loans Pending Approval | <input type="checkbox"/> Other |

List of all dashboard portlets, disabled (or not shown) if not appropriate for user

Graph Display

Loan Performance, PPI Graph, etc...

- Display graphs with tooltips text supplement
- Display text only

Allow individual user to choose display type?

Client List

 Add ClientShow entries

Office

Search:

| Client Name | Client account no. | Status | Office name |
|------------------|--------------------|--------|-------------|
| 123 JOE 234 | 00000009 | Active | HEAD OFFICE |
| abc ra | 00000132 | Active | HEAD OFFICE |
| abf abdabd badf | 00000120 | Active | HEAD OFFICE |
| abfb abf abf | 00000112 | Active | HEAD OFFICE |
| aeb abeb abdf | 00000118 | Active | HEAD OFFICE |
| allan corbin | 00000078 | Active | HEAD OFFICE |
| asdfg rao | 00000146 | Active | HEAD OFFICE |
| ashok gowda | 00000003 | Active | HEAD OFFICE |
| Avinash M | 00000013 | Active | HEAD OFFICE |
| ba | 00000117 | Active | HEAD OFFICE |
| ba ba ba | 00000101 | Active | HEAD OFFICE |
| ba bad bad | 00000103 | Active | HEAD OFFICE |
| bad ab na | 00000102 | Active | HEAD OFFICE |
| badf | 00000104 | Active | HEAD OFFICE |
| baie ba vbab | 00000072 | Active | HEAD OFFICE |
| be abfd abdf | 00000114 | Active | HEAD OFFICE |
| bgfdg gdfg fgdfg | 00000129 | Active | HEAD OFFICE |
| badf | 00000104 | Active | HEAD OFFICE |
| baie ba vbab | 00000072 | Active | HEAD OFFICE |
| be abfd abdf | 00000114 | Active | HEAD OFFICE |
| bgfdg gdfg fgdfg | 00000129 | Active | HEAD OFFICE |



Clients

New Client

Filter by:

None



Search

| Client Number | Family Name | Given Name | Status | Loan Officer | Loan Balance |
|---------------|-------------|------------|--------|----------------|--------------|
| 10000001 | San Pietro | Cherry | Active | Lorenz Guzman | 0.0 |
| 10000002 | Cipriano | Maria | Active | Lorenz Guzman | 0.0 |
| 10000003 | Flores | Ana | Active | Lorenz Guzman | 0.0 |
| 10000004 | Johnson | Kate T. | Active | Lorenz Guzman | 0.0 |
| 10000005 | Yee | Francine | Active | Lorenz Guzman | 0.0 |
| 10000006 | White | Betty | Active | Sally Magalang | 0.0 |
| 10000007 | Frau | Madeline | Active | Sally Magalang | 520.0 |
| 10000008 | Hermanson | Ken | Active | Sally Magalang | 570.0 |
| 10000009 | Whit | Janet | Active | Sally Magalang | 0.0 |
| 10000010 | Franklin | Ben | Active | Sally Magalang | 0.0 |
| 10000011 | White | Michael | Active | Sally Magalang | 0.0 |
| 10000012 | Robinson | Jennifer | Active | Sally Magalang | 2352.0 |
| 10000013 | Caballero | Donia | Active | Lorenz Guzman | 25430.0 |
| 10000014 | Alvarez | Livia | Active | Lorenz Guzman | 344200.0 |
| 10000015 | Valdez | Bryan | Active | Lorenz Guzman | 656.0 |
| 10000016 | Merquez | Juanita | Active | Lorenz Guzman | 1576.0 |



Claire Client [Branch > Center > Group > Claire Client](#)

Go to Alternate Actions

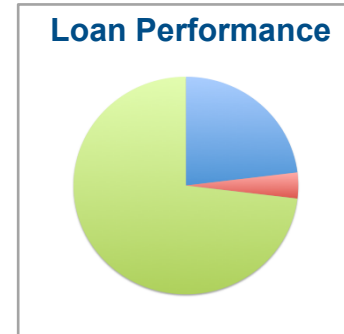
Summary Documents

Edit Client
 New Loan
 New Savings
 Add Note

Notes



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



| Loan Accounts | | Balance | Status |
|--------------------------------------|-------------|-----------|------------------------|
| Standard Client Loan | #0012013562 | -11,356.2 | Active in Bad Standing |
| Home Loan | #0012031092 | -8,245.0 | Application Approved |
| Car Loan | #0012020099 | -2,000 | Pending Approval |
| Agriculture Loan | #0012010104 | -562.0 | Active |
| Agriculture Loan | #0012010105 | -1,000 | Active |

| Savings Accounts | | 23% of loan value | |
|------------------------------------|-------------|-------------------|--------|
| Mandatory Savings | #0023024128 | 4750.0 | Active |
| Individual Savings | #0023016348 | 462 | Active |



Claire Client

Branch > Center > Group > Claire Client

Go to Alternate Actions

Summary

Documents

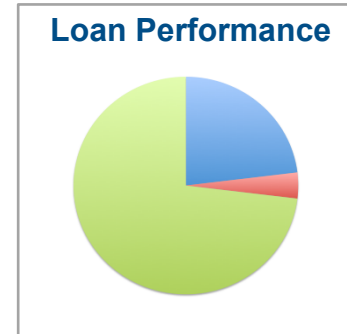
Additional Info

Edit Client
 New Loan
 New Savings
 Add Note

Questions
 Notes



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



| Loan Accounts | | Balance | Status |
|--------------------------------------|-------------|-----------|------------------------|
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Claire Client

Branch > Center > Group > Claire Client

Summary

Documents

Additional Info

Edit Client
 New Loan
 New Savings
 Add Note

Notes



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

PPI Scores

Due again in 4 weeks
 2.45 - 7 Jul 2012
 1.98 - 15 Dec 2011
 2.10 - 2 Jun 2011

Loan Performance

Balance: 8,329
 Due Weekly: 511
 Active Loans: 3
Delinquent: 1,256
 Savings: 5,212
 Mtgs Attended: 9
 Mtgs Missed: 0

| Loan Accounts | | Balance | Status |
|--------------------------------------|-------------|-----------|------------------------|
| Standard Client Loan | #0012013562 | -11,356.2 | Active in Bad Standing |
| Home Loan | #0012031092 | -8,245.0 | Application Approved |
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|------------------------------------|-------------|-------------------|--------|
| Mandatory Savings | #0023024128 | 4750.0 | Active |
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Claire Client

[Branch](#) > [Center](#) > [Group](#) > [Claire Client](#)

- Summary
- Documents
- Additional Info**



Claire Client [Branch > Center > Group > Claire Client](#)

[Summary](#)
[Documents](#)
[Additional Info](#)

[Edit Client](#)
[+ New Loan](#)
[+ New Savings](#)

Notes



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

PPI - 2.45



Loan Perform



Notes (8)

[+ See All](#)

Lorenz Guzman: Will miss Tuesday, Jun. 11, 2013 mtg. On vacation.
5 min ago

System Admin: Transferred from Larry Lender to Lorenz Guzman on Jun 4, 2013.
12 hours ago

Larry Lender: Added national ID card.
Feb. 21, 2013

| Loan Accounts | | Balance | Status |
|--------------------------------------|-------------|-----------|------------------------|
| Standard Client Loan | #0012013562 | -11,356.2 | Active in Bad Standing |
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|------------------------------------|-------------|-------------------|--------|
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Claire Client

Branch > Center > Group > Claire Client

Summary Documents Additional Info

Edit Client + New Loan + New Savings Add Note

Notes



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

PPI - 2.45

Loan Performance

Client Notes (8) + Add Note

Lorenz Guzman: Will miss Tuesday, Jun. 11, 2013 mtg. On vacation.
5 min ago Edit Delete

System Admin: Transferred from Larry Lender to Lorenz Guzman on Jun 4, 2013.
12 hours ago

Larry Lender: Added national ID card.
Feb. 21, 2013

System Admin: Another note.
Feb. 19, 2013

System Admin: Yet another note.
Feb. 19, 2013

System Admin: Client created.
Dec. 11, 2012

Edit and Delete appear when user moves cursor over note.

Loan Accounts

| | |
|----------------------|--------|
| Standard Client Loan | #00120 |
| Home Loan | #00120 |
| Car Loan | #00120 |
| Agriculture Loan | #00120 |
| Agriculture Loan | #00120 |

Savings Accounts

| | |
|--------------------|--------|
| Mandatory Savings | #00230 |
| Individual Savings | #00230 |

| | |
|--------------|---|
| Bad Standing | 👎 |
| Approved | ★ |
| Approval | 🕒 |
| | ✅ |
| | ✅ |
| | ✅ |
| | ✅ |



Claire Client

Branch > Center > Group > Claire Client

Summary

Documents

Additional Info

Edit Client New Loan New Savings Add Note

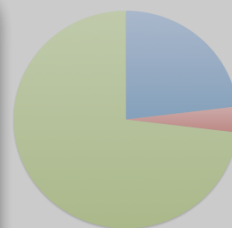
Notes



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

PPI - 2.45

Loan Performance



Loan Accounts

| | |
|----------------------|--------|
| Standard Client Loan | #00120 |
| Home Loan | #00120 |
| Car Loan | #00120 |
| Agriculture Loan | #00120 |
| Agriculture Loan | #00120 |

Savings Accounts

| | |
|--------------------|--------|
| Mandatory Savings | #00230 |
| Individual Savings | #00230 |

Client Notes (7)

+ Add Note

System Admin: Transferred from Larry Lender to Lorenz Guzman on Jun 4, 2013.
12 hours ago

Larry Lender: Added national ID card.
Feb. 21, 2013

System Admin: Another note.
Feb. 19, 2013

System Admin: Yet another note.
Feb. 19, 2013

System Admin: Client created.
Dec. 11, 2012

Bad Standing

Approved

Approval



Claire Client Branch > Center > Group > Claire Client

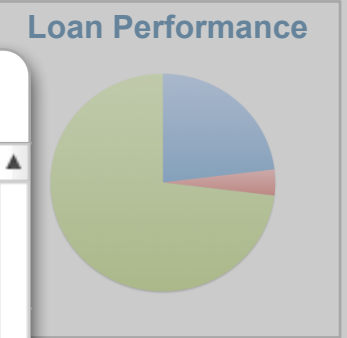
Summary Documents Additional Info

Edit Client + New Loan + New Savings Add Note Notes



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

PPI - 2.45



Loan Accounts

| | |
|----------------------|--------|
| Standard Client Loan | #00120 |
| Home Loan | #00120 |
| Car Loan | #00120 |
| Agriculture Loan | #00120 |
| Agriculture Loan | #00120 |

Savings Accounts

| | |
|--------------------|--------|
| Mandatory Savings | #00230 |
| Individual Savings | #00230 |

Client Notes + Add Note

type note here Cancel

Lorenz Guzman: Will miss Tuesday, Jun. 11, 2013 mtg. On vacation.
5 min ago

System Admin: Transferred from Larry Lender to Lorenz Guzman on Jun 4, 2013.
12 hours ago

Larry Lender: Added national ID card.
Feb. 21, 2013

System Admin: Another note.
Feb. 19, 2013

System Admin: Yet another note.
Feb. 19, 2013

8 notifications

Bad Standing

Approved

Approval

✓

✓

✓

✓

Claire Client

Branch > Center > Group > Claire Client

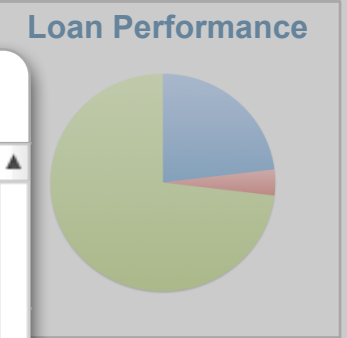
Summary Documents Additional Info

Edit Client + New Loan + New Savings Add Note Notes



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

PPI - 2.45



Loan Accounts

| | |
|----------------------|--------|
| Standard Client Loan | #00120 |
| Home Loan | #00120 |
| Car Loan | #00120 |
| Agriculture Loan | #00120 |
| Agriculture Loan | #00120 |

Savings Accounts

| | |
|--------------------|--------|
| Mandatory Savings | #00230 |
| Individual Savings | #00230 |

Client Notes

+ Add Note [x]

Will miss Tuesday, Jun. 11, 2013 mtg.
On vacation. [Cancel]

System Admin: Transferred from Larry Lender to Lorenz Guzman on Jun 4, 2013.
12 hours ago

Larry Lender: Added national ID card.
Feb. 21, 2013

System Admin: Another note.
Feb. 19, 2013

System Admin: Yet another note.
Feb. 19, 2013

System Admin: Client created.
Dec. 11, 2012

8 notifications

Bad Standing [thumbs down]

Approved [star]

Approval [hourglass]

[checkmark]

[checkmark]

[checkmark]

[checkmark]



Claire Client [Branch > Center > Group > Claire Client](#)

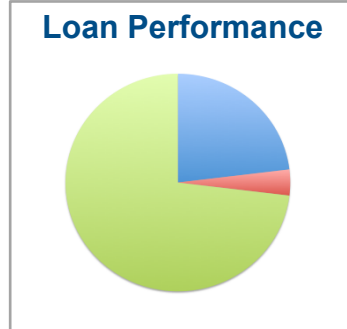
Go to Preferred Actions ?

Summary Documents

Edit Client Actions



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



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

| Loan Accounts | | Balance | Status |
|--------------------------------------|-------------|-----------|------------------------|
| Standard Client Loan | #0012013562 | -11,356.2 | Active in Bad Standing |
| Home Loan | #0012031092 | -8,245.0 | Application Approved |
| Car Loan | #0012020099 | -2,000 | Pending Approval |
| Agriculture Loan | #0012010104 | -562.0 | Active |
| Agriculture Loan | #0012010105 | -1,000 | Active |

| Savings Accounts | | 23% of loan value | |
|------------------------------------|-------------|-------------------|--------|
| Mandatory Savings | #0023024128 | 4750.0 | Active |
| Individual Savings | #0023016348 | 462 | Active |



Claire Client Branch > Center > Group > Claire Client

Summary Documents

Edit Client + New Loan + New Savings Add Note

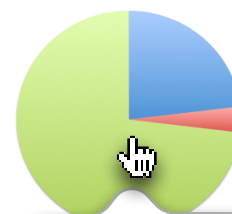


Account No.: **200152006**
 External ID: 532921843
 Activation Date: 02 April 2012
 Office: Bangalore
 Group: Triangle Group
 Loan Cycle: 2

PPI - 2.45



Loan Performance



Recent Notes

5/5/2013 - missed meeting due to funeral

Performance History

| | |
|-------------------|----------|
| In Arrears | 1,256 |
| Balance | 11,356.2 |
| Original Loan | 48,000 |
| Active Loans | 6 |
| Total Savings | 14,668.9 |
| Meetings Attended | 35 |
| Meetings Missed | 3 |

| Loan Accounts | | Balance | Status |
|----------------------|-------------|-----------|---------------|
| Standard Client Loan | #0012013562 | -11,356.2 | Active in Bad |
| Home Loan | #0012031092 | -8,245.0 | Application A |
| Car Loan | #0012020099 | -2,000 | Pending App |
| Agriculture Loan | #0012010104 | -562.0 | Active |
| Agriculture Loan | #0012010105 | -1,000 | Active |

| Savings Accounts | | 23% of loan value | |
|--------------------|-------------|-------------------|--|
| Mandatory Savings | #0023024128 | 4750.0 | Active <input checked="" type="checkbox"/> |
| Individual Savings | #0023016348 | 462 | Active <input checked="" type="checkbox"/> |



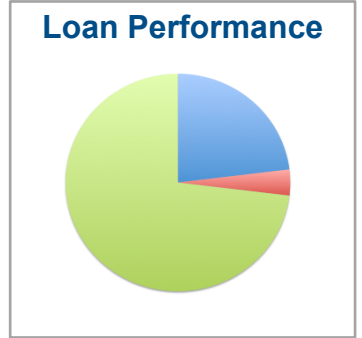
Claire Client

Branch > Center > Group > Claire Client

- Summary
- Documents
- Standard Client Loan: #0010002013562
- Car Loan: #0010002027323



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



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

| Loan Accounts | | Balance | Status |
|----------------------|-------------|-----------|------------------------|
| Standard Client Loan | #0012013562 | -11,356.2 | Active in Bad Standing |
| Home Loan | #0012031092 | -8,245.0 | Application Approved |
| Car Loan | #0012020099 | -2,000 | Pending Approval |
| Agriculture Loan | #0012010104 | -562.0 | Active |
| Agriculture Loan | #0012010105 | -1,000 | Active |

| Savings Accounts | | 23% of loan value | |
|--------------------|-------------|-------------------|--------|
| Mandatory Savings | #0023024128 | 4750.0 | Active |
| Individual Savings | #0023016348 | 462 | Active |



Claire Client

Branch > Center > Group > Claire Client

- Summary
- Documents
- Standard Client Loan: #0012013562
- Car Loan: #0012027323

- Make Payment
- Summary
- Charges
- Schedule
- Transactions
- Loan Docs
- Actions



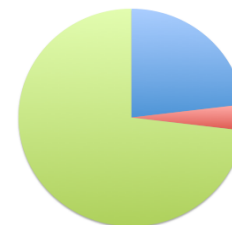
Standard Client Loan: #0012013562



Active in Bad Standing

In Arrears: 1,256

Loan Officer: Larry Lender



Loan Performance

| 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 |

| Account Details | | Edit |
|-----------------------------------|--|------|
| Interest Rate Type | Declining Balance-Interest Recalculation | |
| Interest Rate | 15% APR | |
| Interest Deducted at Disbursement | No | |
| Currency | INR | |
| Grace Period | None | |
| Frequency of Installments | Weekly | |
| Number of Installments | 6 | |



Claire Client

Branch > Center > Group > Claire Client

Summary

Documents

Standard Client Loan:
#0012013562

Make Payment

Summary

Charges

Schedule

Transactions

Loan Docs

Actions



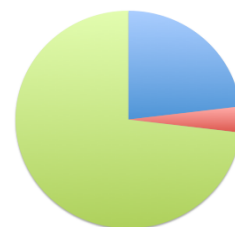
Standard Client Loan: #0012013562



Active in Bad Standing

In Arrears: 1,256

Loan Officer: Larry Lender



Loan Performance

| 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 |

| Account Details | | Edit |
|-----------------------------------|--|------|
| Interest Rate Type | Declining Balance-Interest Recalculation | |
| Interest Rate | 15% APR | |
| Interest Deducted at Disbursement | No | |
| Currency | INR | |
| Grace Period | None | |
| Frequency of Installments | Weekly | |
| Number of Installments | 6 | |



Claire Client

Branch > Center > Group > Claire Client

Summary

Documents

Standard Client Loan:
#0012013562

Make Payment

Summary

Charges

Schedule

Transactions

Loan Docs

Actions



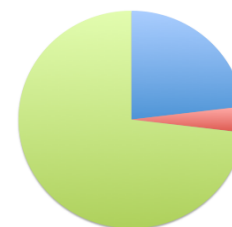
Standard Client Loan: #0012013562



Active in Bad Standing

In Arrears: 1,256

Loan Officer: Larry Lender



Loan Performance

| 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 |

| Account Details | | Edit |
|-----------------------------------|--|------|
| Interest Rate Type | Declining Balance-Interest Recalculation | |
| Interest Rate | 15% APR | |
| Interest Deducted at Disbursement | No | |
| Currency | INR | |
| Grace Period | None | |
| Frequency of Installments | Weekly | |
| Number of Installments | 6 | |



Claire Client

Branch > Center > Group > Claire Client

Summary

Documents

Standard Client Loan:
#0012013562

Car Loan:
#0012027323

Make Payment

Summary

Charges

Schedule

Transactions

Loan Docs

Actions



Standard Client Loan: #0012013562



Active in Bad Stan
In Arrears: 1,256
Loan Officer: Larry

Loan Repayment

Repayment Date: 14 June 2013

Amount: 700.00

Payment Type: Cash

Note:

▶ Payment Details:

Save or Cancel

Account Summary

- Principal
- Interest
- Fees
- Penalty
- Total

Account Details

- Interest Rate Type
- Interest Rate
- Interest Deducted at Di
- Currency
- Grace Period: None
- Frequency of Installments: Weekly
- Number of Installments: 6



Claire Client

Branch > Center > Group > Claire Client

Summary

Documents

Car Loan:
#0012027323

[Approve Loan](#)
[Summary](#)
[Charges](#)
[Schedule](#)
[Transactions](#)
[Loan Docs](#)
[Actions](#)



Car Loan - #0012027323



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



Loan Performance

| 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 | 2,718.3 |

| Account Details | | Edit |
|-----------------------------------|--|------|
| Interest Rate Type | Declining Balance-Interest Recalculation | |
| Interest Rate | 15% APR | |
| Interest Deducted at Disbursement | No | |
| Currency | INR | |
| Grace Period | None | |
| Frequency of Installments | Weekly | |
| Number of Installments | 6 | |



Claire Client

Branch > Center > Group > Claire Client

Summary

Documents

Car Loan:
#0012027323



Approve



Reject

Summary

Charges

Schedule

Transactions

Loan Docs



Actions



Car Loan - #0012027323



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



Loan Performance

| 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 | 2,718.3 |

| Account Details | | Edit |
|-----------------------------------|--|------|
| Interest Rate Type | Declining Balance-Interest Recalculation | |
| Interest Rate | 15% APR | |
| Interest Deducted at Disbursement | No | |
| Currency | INR | |
| Grace Period | None | |
| Frequency of Installments | Weekly | |
| Number of Installments | 6 | |



Claire Client

Branch > Center > Group > Claire Client

Summary

Documents

Car Loan:
#0012027323



Approve



Reject

Summary

Charges

Schedule

Transactions

Loan Docs



Actions



Car Loan - #0012027323



Pending Approval
Disbursal Date: 5/20/13
Loan Officer: Larry

Approve Loans

You have selected 1 loan to approve.

Date: 14 June 2013

Note:



Approve

Cancel

Account Summary

| | |
|-----------|--|
| Principal | |
| Interest | |
| Fees | |
| Penalty | |
| Total | |

Balance

| |
|---------|
| 2,000 |
| 718.3 |
| 0 |
| 0 |
| 2,718.3 |

Account Details

| | |
|-----------------------------------|--|
| Interest Rate Type | Declining Balance-Interest Recalculation |
| Interest Rate | 15% APR |
| Interest Deducted at Disbursement | No |
| Currency | INR |
| Grace Period | None |
| Frequency of Installments | Weekly |
| Number of Installments | 6 |

Edit



Claire Client

Branch > Center > Group > Claire Client

Summary

Documents

Car Loan:
#0012027323



Approve



Reject

Summary

Charges

Schedule

Transactions

Loan Docs



Actions



Car Loan - #0012027323



Pending Approval
Disbursal Date: 5/1/2013
Loan Officer: Larry

Account Summary

| | |
|-----------|--|
| Principal | |
| Interest | |
| Fees | |
| Penalty | |
| Total | |

Account Details

| | |
|-----------------------------------|--|
| Interest Rate Type | Declining Balance-Interest Recalculation |
| Interest Rate | 15% APR |
| Interest Deducted at Disbursement | No |
| Currency | INR |
| Grace Period | None |
| Frequency of Installments | Weekly |
| Number of Installments | 6 |

| | |
|---------|---------|
| Balance | |
| | 2,000 |
| | 718.3 |
| | 0 |
| | 0 |
| | 2,718.3 |

Reject Loans

You have selected 1 loan to reject. Please provide a reason.

Date:

Note:

Reject

Cancel



Claire Client

Branch > Center > Group > Claire Client

Summary

Documents

Car Loan:
#0012027323

Make Payment

Summary

Charges

Schedule

Transactions

Loan Docs

Actions



Car Loan - #0012027323



Approved

Disbursal Date: 5/31/2013

Loan Officer: Larry Lender

First payment due: 6/6/2013



Loan Performance

| 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 | 2,718.3 |

| Account Details | | Edit |
|-----------------------------------|--|------|
| Interest Rate Type | Declining Balance-Interest Recalculation | |
| Interest Rate | 15% APR | |
| Interest Deducted at Disbursement | No | |
| Currency | INR | |
| Grace Period | None | |
| Frequency of Installments | Weekly | |
| Number of Installments | 6 | |



Claire Client

Branch > Center > Group > Claire Client

Summary

Documents

Car Loan:
#0012027323

- [Approve](#)
[Reject](#)
[Summary](#)
[Charges](#)
[Schedule](#)
[Transactions](#)
[Loan Docs](#)
[Actions](#)



Car Loan - #0012027323



Rejected
 Savings is only 10% of loan value
 Loan Officer: Larry Lender



Loan Performance

| 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 | 2,718.3 |

| Account Details | | Edit |
|-----------------------------------|--|------|
| Interest Rate Type | Declining Balance-Interest Recalculation | |
| Interest Rate | 15% APR | |
| Interest Deducted at Disbursement | No | |
| Currency | INR | |
| Grace Period | None | |
| Frequency of Installments | Weekly | |
| Number of Installments | 6 | |



Claire Client

Branch > Center > Group > Claire Client

Summary

Documents

Standard Client Loan:
#0012013562

Car Loan:
#0012027323

Approve Loan

Summary

Charges

Schedule

Transactions

Loan Docs

Actions



Car Loan - #0012027323



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



Loan Performance

| 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 | 2,718.3 |

| Account Details | Edit |
|-----------------------------------|--|
| Interest Rate Type | Declining Balance-Interest Recalculation |
| Interest Rate | 15% APR |
| Interest Deducted at Disbursement | No |
| Currency | INR |
| Grace Period | None |
| Frequency of Installments | Weekly |
| Number of Installments | 6 |



Claire Client

Branch > Center > Group > Claire Client

Summary

You do not have permission to approve this loan. Would you like to send a reminder to the approver now?

[Yes](#) [No](#)

Approve

Loan Docs

Actions



Car Loan - #0012027323



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



Loan Performance

| 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 | 2,718.3 |

| Account Details | | Edit |
|-----------------------------------|--|----------------------|
| Interest Rate Type | Declining Balance-Interest Recalculation | |
| Interest Rate | 15% APR | |
| Interest Deducted at Disbursement | No | |
| Currency | INR | |
| Grace Period | None | |
| Frequency of Installments | Weekly | |
| Number of Installments | 6 | |



Claire Client

Branch > Center > Group > Claire Client

Summary

Documents

Standard Client Loan:
#0012012562

Car Loan:
#0012027323

This message fades
Go to [Maria Manager's view now](#)

Approve Loan
 Reminder to approve this loan sent to Maria Manager.

Actions ▼



Car Loan - #0012027323



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



Loan Performance

| 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 | 2,718.3 |

| Account Details | | Edit |
|-----------------------------------|--|----------------------|
| Interest Rate Type | Declining Balance-Interest Recalculation | |
| Interest Rate | 15% APR | |
| Interest Deducted at Disbursement | No | |
| Currency | INR | |
| Grace Period | None | |
| Frequency of Installments | Weekly | |
| Number of Installments | 6 | |



Bulk Entry - Enter Data

Enter data and click Preview. Click Cancel to return to Clients & Accounts.

Center: **Boeung Salang** Branch Office: ADMCambodia Mode of Payment: Cash
 Date of Transaction: Loan Officer: Kim Huch Sieng

| Borrower | Due/Collections | | | | | | | Issues/Withdrawals | | | | | | | A/C Coll | Attendance |
|--------------------|-----------------|---------|-------|-------|--------|--------|-------|--------------------|------|-----|------|-----|-----|-----|----------|------------|
| | ADM | ADM3 | LTL | dbir | MS1 | SA | DCF | ADM | ADM3 | LTL | dbir | MS1 | SA | DCF | | |
| Group 100 | | | | | | | | | | | | | | | | |
| Komik Batmana | | | | | | 1000.0 | | | | | | | | | 0.0 | Present |
| Tymteusz Otworthy | 2513.5 | | | | | 0.0 | | | | | | | | | 2.0 | Late |
| Mohamed Adil | | | 115.0 | | | 0.0 | | | | | | | | | 23.0 | Absent |
| Group Account(s) | | | | | | | | | | | | | | | 0.0 | |
| Group Total | 2513.5 | 0.0 | 115.0 | 0.0 | 0.0 | 1000.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 25.0 | |
| Group ABC | | | | | | | | | | | | | | | | |
| SHG Client | | 6954.0 | | 170.1 | | 0.0 | 500.0 | | | | | | | | 0.0 | Approved |
| Tet sw Tes asas | | 3477.0 | | | | 0.0 | | | | | | | | | 0.0 | Present |
| Client test211 | | 5316.0 | | | 2000.0 | 0.0 | | | | | | | | | 0.0 | Present |
| Group account(s) | | | | | | | | | | | | | | | | |
| Group Total | 0.0 | 15747.0 | 0.0 | 170.1 | 2000.0 | 0.0 | 500.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | |

Total Collections

Due Collections:
 Other Collections:
Total:

Total Issues/Withdrawals

Loan Disbursements:
 Withdrawals:
Total:

Net Cash:

Okay

Cancel

Create a Checklist

Name:

Type:

- Mifos task
- Manual task

Task 1:

[Add a task to checklist](#)

Mifos - Individual Lending

https://demo.openmf.org

Mifos Clients Loans Administration Accounting Reports Tenant: default Search Culture mifos Sign out

New Member Checklist - Miranda Vazquez

| Task | Done By | Approved By |
|---|--------------|---------------|
| <input checked="" type="checkbox"/> Client created in Mifos | Larry Lender | Maria Manager |
| <input type="checkbox"/> Verify actively involved in income generating activity | Larry Lender | Maria Manager |
| <input type="checkbox"/> Establish Creditworthiness | Larry Lender | Maria Manager |

Group:

Task 1:

Name: Loan Approval Process

- Mifos task
- Manual task

Task 1: Create new loan

Type: Loan

[Add a task to checklist](#)

Administrative Tasks

Organization

- Offices
 - Centers
 - Groups
- Employees
- Funds
- Loan Products
- Savings Products
- Charges
- Currency Configuration
- Bulk Loan Reassignment

System

- Configure Maker Checker Tasks
- Global Configuration
- Reports
- Audit
- Data Tables
- Code

Users

- Users
 - Roles
 - Permissions

Configuration

Organization

Display

Other

Other

Managing Groups

Does your organization manage client relationships through groups, centers, or communal banks?

- Groups only
- Centers and Groups
- Communal Banks

Other Organization Configuration

Configuration

Organization

Display

Other

Other

Managing Groups

Does your organization manage client relationships through groups, centers, or communal banks?

- Groups only
- Centers and Groups
- Communal Banks



View System Users

Add User

| User Name | Family Name | Given Name | Branch | Role | Status | Password Expiry |
|---------------------------|------------------|--------------|-----------------|---------------------|-------------------|-----------------|
| ase | Abe | Praveen | Adhikar | Loan Officer | Active | None |
| Ankitg | Acutt | Nicolas | Adhikar | Loan Officer | Active | 21/08/2013 |
| ase | Adicar | Brian | Head Office | Director | Active | 06/09/2013 |
| dorine | Amiet | Dorine | Branch 1 | Assistant | Active | None |
| amapolley | Amapolley | Annor | Branch 1 | Loan Officer | Terminated | None |
| Ari | Arys | Arismendy | Branch 1 | Branch Mgr | Active | 08/10/2013 |
| agonza | Andres | Gonzalez | Branch 2 | Loan Officer | Active | None |
| user1 | Bbb | Jeff | Branch 2 | Loan Officer | Active | 06/09/2013 |
| user2 | Ccc | Arnold | Branch 2 | Loan Officer | Active | None |
| user3 | Ddd | Arnold | Branch 2 | Loan Officer | Active | None |
| user4 | Eee | Arnold | Branch 2 | Loan Officer | Terminated | Cancelled |
| user5 | Fff | Arnold | Branch 2 | Loan Officer | Active | None |
| user6 | Ggg | Arnold | Branch 1 | Loan Officer | Active | 05/06/2013 |
| user7 | Hhh | Arnold | Branch 1 | Loan Officer | Active | 05/06/2013 |
| user8 | l ii | Arnold | Branch 1 | Loan Officer | Active | None |
| user9 | Jjj | Arnold | Branch 2 | Branch Mgr | Active | 29/06/2013 |



View System Users

| User Name | Family Name |
|-----------|-------------|
| ase | Ab |
| Ankitg | Ac |
| ase | Ad |
| dorine | Am |
| amapolley | Am |
| Ari | Ary |
| agonza | An |
| user1 | Bb |
| user2 | Cc |
| user3 | Dd |
| user4 | Ee |
| user5 | Ff |
| user6 | Gg |
| user7 | Hh |
| user8 | Ii |
| user9 | Jj |

User Details



User Details

| | |
|-------------|--|
| User Name | <input type="text"/> |
| Family Name | <input type="text"/> |
| Given Name | <input type="text"/> |
| Email | <input type="text"/> |
| Office | Head Office <input type="button" value="v"/> |
| Role(s) | <input type="checkbox"/> Branch Manager <input type="checkbox"/> Coordinator of Agents <input type="checkbox"/> Data Entry Administrator <input type="checkbox"/> Director of the Program <input type="checkbox"/> Field Officer <input type="checkbox"/> Funder <input type="checkbox"/> Group Leader <input checked="" type="checkbox"/> Loan Officer <input type="checkbox"/> Sales <input type="checkbox"/> SE <input type="checkbox"/> Super User |

Save

Cancel



View System Users

| User Name | Family Name |
|-----------|-------------|
| ase | Ab |
| Ankitg | Ac |
| ase | Ad |
| dorine | Am |
| amapolley | Am |
| Ari | Ary |
| agonza | An |
| user1 | Bb |
| user2 | Cc |
| user3 | Dd |
| user4 | Ee |
| user5 | Ff |
| user6 | Gg |
| user7 | Hh |
| user8 | Ii |
| user9 | Jj |

User Details

User Details

| | |
|-------------|--|
| User Name | <input type="text" value="dorine"/> |
| Family Name | <input type="text" value="Amiet"/> |
| Given Name | <input type="text" value="Dorine"/> |
| Email | <input type="text" value="damiet@mfi.org"/> |
| Office | <input type="text" value="Head Office"/> |
| Role(s) | <ul style="list-style-type: none"><input type="checkbox"/> Branch Manager<input type="checkbox"/> Coordinator of Agents<input type="checkbox"/> Data Entry Administrator<input type="checkbox"/> Director of the Program<input type="checkbox"/> Field Officer<input type="checkbox"/> Funder<input type="checkbox"/> Group Leader<input type="checkbox"/> Loan Officer<input type="checkbox"/> Sales<input type="checkbox"/> SE<input checked="" type="checkbox"/> Super User |

Save

Cancel

Loans

 [New Loan](#)

Filter by:

None

Search

| Loan Number | Loan Status | Loan Product | Principal | Total Outstanding | Overdue |
|--------------------------|------------------------|----------------|-----------|-------------------|---------|
| 10000001 | Active | Home Loan | 1000 | 12,110 | 0 |
| 10000002 | Withdrawn by applicant | Home Loan | 2000 | 5,210 | 0 |
| 10000003 | Pending approval | Home Loan | 1000 | 32,210 | 0 |
| 10000004 | Active | Car Loan | 1500 | 5,213 | 500 |
| 10000005 | Active in Bad Standing | Car Loan | 1500 | 3,259 | 3,000 |
| 10000006 | Approved | Emergency Loan | 100 | 1000 | 0 |
| 10000007 | Active | Festival Loan | 100 | 700 | 0 |
| 10000008 | Closed (written off) | Festival Loan | 100 | 600 | 600 |
| 10000009 | Active | Business Loan | 500 | 4,540 | 0 |
| 10000010 | Active | Business Loan | 500 | 5,218 | 0 |
| 10000011 | Pending Approval | Business Loan | 500 | 3,219 | 0 |
| 10000012 | Active | Business Loan | 1000 | 3,210 | 0 |
| 10000013 | Active | Home Loan | 1000 | 34,211 | 0 |
| 10000014 | Approved | Car Loan | 500 | 3,400 | 0 |
| 10000015 | Pending approval | Business Loan | 400 | 2,000 | 0 |
| 10000016 | Approved | Business Loan | 500 | 2,000 | 0 |

Loans

 [New Loan](#)

Filter by:

- None
- Pending Approval**
- Active in Bad Standing
- Closed
- Withdrawn

Search

| Loan Number | Loan Status | Loan Product | | Outstanding | Overdue |
|--------------------------|------------------------|----------------|------|-------------|---------|
| 10000001 | Active | Home Loan | | 0 | 0 |
| 10000002 | Withdrawn by applicant | Home Loan | | 0 | 0 |
| 10000003 | Pending approval | Home Loan | 1000 | 32,210 | 0 |
| 10000004 | Active | Car Loan | 1500 | 5,213 | 500 |
| 10000005 | Active in Bad Standing | Car Loan | 1500 | 3,259 | 3,000 |
| 10000006 | Approved | Emergency Loan | 100 | 1000 | 0 |
| 10000007 | Active | Festival Loan | 100 | 700 | 0 |
| 10000008 | Closed (written off) | Festival Loan | 100 | 600 | 600 |
| 10000009 | Active | Business Loan | 500 | 4,540 | 0 |
| 10000010 | Active | Business Loan | 500 | 5,218 | 0 |
| 10000011 | Pending Approval | Business Loan | 500 | 3,219 | 0 |
| 10000012 | Active | Business Loan | 1000 | 3,210 | 0 |
| 10000013 | Active | Home Loan | 1000 | 34,211 | 0 |
| 10000014 | Approved | Car Loan | 500 | 3,400 | 0 |
| 10000015 | Pending approval | Business Loan | 400 | 2,000 | 0 |
| 10000016 | Approved | Business Loan | 500 | 2,000 | 0 |



Loans



Filter by:

Pending Approval

Search

| <input type="checkbox"/> | Loan Number | Loan Status | Loan Product | Principal | Total Outstanding | Date Submitted |
|-------------------------------------|-------------|------------------|----------------|-----------|-------------------|----------------|
| <input checked="" type="checkbox"/> | 10000011 | Pending Approval | Business Loan | 500 | 3,219 | May 23, 2013 |
| <input checked="" type="checkbox"/> | 10000002 | Pending Approval | Business Loan | 400 | 2,000 | May 23, 2013 |
| <input type="checkbox"/> | 10000213 | Pending Approval | Home Loan | 1000 | 32,210 | May 28, 2013 |
| <input checked="" type="checkbox"/> | 10000054 | Pending Approval | Car Loan | 1500 | 5,213 | May 28, 2013 |
| <input type="checkbox"/> | 10000321 | Pending Approval | Car Loan | 1500 | 3,259 | May 28, 2013 |
| <input type="checkbox"/> | 10000006 | Pending Approval | Emergency Loan | 100 | 1000 | May 28, 2013 |



Loans



Filter by:

Pending Approval

Search

| <input type="checkbox"/> | Loan Number | Loan Status | Loan Product | Principal | Total Outstanding | Date Submitted |
|-------------------------------------|-------------|------------------|--------------|-----------|-------------------|----------------|
| <input checked="" type="checkbox"/> | 10000011 | Pending Approval | | 500 | 3,219 | May 23, 2013 |
| <input checked="" type="checkbox"/> | 10000002 | Pending Approval | | | 1,000 | May 23, 2013 |
| <input type="checkbox"/> | 10000213 | Pending Approval | | | 2,210 | May 28, 2013 |
| <input checked="" type="checkbox"/> | 10000054 | Pending Approval | | | 2,213 | May 28, 2013 |
| <input type="checkbox"/> | 10000321 | Pending Approval | | | 2,259 | May 28, 2013 |
| <input type="checkbox"/> | 10000006 | Pending Approval | | | 1,000 | May 28, 2013 |

Approve Loans

You have selected 3 loans to approve.

Date: 14 June 2013

Note:



Manage Groups

Head Office > Mangalore

Groups

Centers

Communal Banks

+ New Group

Filter by: None

Search

| Group Name | Office | Loan Officer | Activation Date | # of Clients | Center |
|--------------------------|-------------|----------------|-----------------|--------------|----------|
| Group 1 | Head Office | Lorenz Guzman | 5 May 2010 | 10 | Center 1 |
| Group 2 | Branch 1 | Sally Magalang | 12 Jun 2010 | 8 | Center 2 |
| Group 3 | Head Office | Lorenz Guzman | 18 Jul 2010 | 10 | Center 1 |
| Group 4 | Head Office | Lorenz Guzman | 4 Feb 2009 | 12 | Center 1 |
| Group 5 | Branch 1 | Sally Magalang | 28 Oct 2009 | 9 | Center 2 |
| Group 6 | Branch 2 | Larry Lender | 15 Apr 2011 | 15 | |
| Group 7 | Branch 2 | Larry Lender | 25 May 2011 | 12 | |
| Group 8 | Branch 2 | Larry Lender | 23 Aug 2011 | 8 | |
| Group 9 | Head Office | Lorenz Guzman | 25 Sept 2009 | 10 | |
| Group 10 | Head Office | Lorenz Guzman | 15 Nov 2010 | 11 | |
| Group 11 | Head Office | Michael Krazny | 4 Feb 2011 | 9 | Center 3 |
| Group 12 | Head Office | Michael Krazny | 10 Jan 2008 | 10 | Center 3 |
| Group 13 | Head Office | Michael Krazny | 10 Jan 2008 | 8 | Center 3 |
| Group 14 | Branch 3 | Bryan Adams | 15 July 2011 | 10 | Center 4 |
| Group 15 | Branch 3 | Bryan Adams | 31 Aug 2010 | 12 | Center 4 |
| Group 16 | Branch 3 | Bryan Adams | 2 Mar 2009 | 7 | Center 4 |

[Branch > Center](#)

Centers

Groups

Communal Banks

New Group

| Group Name | Center | Loan Officer | Meeting Time | Status | Location | Activation Date |
|--------------------|----------|--------------|-------------------|--------|---------------------|-----------------|
| The Red Hat Ladies | Center 1 | Harish Kumar | Tuesday 9-10 am | Active | St. Joseph's School | 3 May 2010 |
| Bengals | Center 1 | Harish Kumar | Tuesday 10-11 am | Active | St. Joseph's School | 21 Apr 2011 |
| Group 3 | Center 1 | Harish Kumar | Tuesday 11-12 am | Status | St. Joseph's School | 21 Apr 2011 |
| Grace Group | Center 2 | Harish Kumar | Wednesday 8-9 am | Active | Cubbon Road | 15 Jun 2010 |
| Another Group | Center 2 | Harish Kumar | Wednesday 9-10 am | Active | Cubbon Road | 23 Oct 2009 |
| Turquoise Group | None | Larry Lender | Monday 8-9 am | Active | Ganesh Temple | 31 Aug 2011 |
| Ruby Group | None | Larry Lender | Monday 9-10 am | Active | Hanuman Temple | 2 Feb 2012 |
| Sky Group | None | Larry lender | Monday 10-11 am | Active | Adi Shakthi Temple | 8 Feb 2011 |

Manage Groups

Head Office > Mangalore

Groups

Centers

Communal Banks

+ New Group

| Group Name | Office |
|------------|-------------|
| Group 1 | Head Office |
| Group 2 | Branch 1 |
| Group 3 | Head Office |
| Group 4 | Head Office |
| Group 5 | Branch 1 |
| Group 6 | Branch 2 |
| Group 7 | Branch 2 |
| Group 8 | Branch 2 |
| Group 9 | Head Office |
| Group 10 | Head Office |
| Group 11 | Head Office |
| Group 12 | Head Office |
| Group 13 | Head Office |
| Group 14 | Branch 3 |
| Group 15 | Branch 3 |
| Group 16 | Branch 3 |

New Group

Office:

Staff:

Name:

ID:

Meeting:

Attach Meeting...

Activate on

Clients:

Browse...

Remove

Done

Cancel

Manage Groups

Head Office > Mangalore

Groups

Centers

Communal Banks

+ New Group

| Group Name | Office |
|------------|-------------|
| Group 1 | Head Office |
| Group 2 | Branch 1 |
| Group 3 | Head Office |
| Group 4 | Head Office |
| Group 5 | Branch 1 |
| Group 6 | Branch 2 |
| Group 7 | Branch 2 |
| Group 8 | Branch 2 |
| Group 9 | Head Office |
| Group 10 | Head Office |
| Group 11 | Head Office |
| Group 12 | Head Office |
| Group 13 | Head Office |
| Group 14 | Branch 3 |
| Group 15 | Branch 3 |
| Group 16 | Branch 3 |

New Group

Office: Head Office

Filter by: Lorenz Guzman Search

| Family Name | Given Name | Client Number | Status |
|-------------|------------|---------------|----------|
| Alvarez | Livia | 10000014 | Active |
| Caballero | Donia | 10000013 | Active |
| Cipriano | Maria | 10000002 | Active |
| Flores | Ana | 10000003 | Active |
| Frankln | Ben | 10000032 | Pending |
| Frau | Madeline | 10000016 | Active |
| Lange | Karen May | 10000011 | Inactive |
| Merquez | Juanita | 10000009 | Active |
| Robinson | Jennifer | 10000035 | Pending |
| Trujillo | Marcos | 10000021 | Active |

0 clients selected

Add Cancel

Manage Groups

Head Office > Mangalore

Groups

Centers

Communal Banks

+ New Group

| Group Name | Office |
|------------|-------------|
| Group 1 | Head Office |
| Group 2 | Branch 1 |
| Group 3 | Head Office |
| Group 4 | Head Office |
| Group 5 | Branch 1 |
| Group 6 | Branch 2 |
| Group 7 | Branch 2 |
| Group 8 | Branch 2 |
| Group 9 | Head Office |
| Group 10 | Head Office |
| Group 11 | Head Office |
| Group 12 | Head Office |
| Group 13 | Head Office |
| Group 14 | Branch 3 |
| Group 15 | Branch 3 |
| Group 16 | Branch 3 |

New Group

Office: Head Office

Filter by: Lorenz Guzman Search

| Family Name | Given Name | Client Number | Status |
|-------------|------------|---------------|----------|
| Alvarez | Livia | 100000014 | Active |
| Caballero | Donia | 100000013 | Active |
| Cipriano | Maria | 100000002 | Active |
| Flores | Ana | 100000003 | Active |
| Frankln | Ben | 100000032 | Pending |
| Frau | Madeline | 100000016 | Active |
| Lange | Karen May | 100000011 | Inactive |
| Merquez | Juanita | 100000009 | Active |
| Robinson | Jennifer | 100000035 | Pending |
| Trujillo | Marcos | 100000021 | Active |

3 clients selected

Add Cancel

Manage Groups

Head Office > Mangalore

Groups

Centers

Communal Banks

+ New Group

| Group Name | Office |
|------------|-------------|
| Group 1 | Head Office |
| Group 2 | Branch 1 |
| Group 3 | Head Office |
| Group 4 | Head Office |
| Group 5 | Branch 1 |
| Group 6 | Branch 2 |
| Group 7 | Branch 2 |
| Group 8 | Branch 2 |
| Group 9 | Head Office |
| Group 10 | Head Office |
| Group 11 | Head Office |
| Group 12 | Head Office |
| Group 13 | Head Office |
| Group 14 | Branch 3 |
| Group 15 | Branch 3 |
| Group 16 | Branch 3 |

New Group

Office: Head Office

Staff: -- Select Loan Officer --

Name: Group 1

ID: 001000321

Meeting:

Activate on

Clients:

| | | | | |
|---------|----------|-----------|---------|---|
| Flores | Ana | 100000003 | Active | <input type="button" value="Browse..."/> <input type="button" value="Remove"/> |
| Frankln | Ben | 100000032 | Pending | |
| Yee | Francine | 100000016 | Active | |

Manage Groups

Head Office > Mangalore

Groups

Centers

Communal Banks

+ New Group

| Group Name | Office |
|------------|-------------|
| Group 1 | Head Office |
| Group 2 | Branch 1 |
| Group 3 | Head Office |
| Group 4 | Head Office |
| Group 5 | Branch 1 |
| Group 6 | Branch 2 |
| Group 7 | Branch 2 |
| Group 8 | Branch 2 |
| Group 9 | Head Office |
| Group 10 | Head Office |
| Group 11 | Head Office |
| Group 12 | Head Office |
| Group 13 | Head Office |
| Group 14 | Branch 3 |
| Group 15 | Branch 3 |
| Group 16 | Branch 3 |

New Group

Office:

Staff:

Name:

ID:

Meeting:

Activate on

Clients:

| | | | | |
|----------|----------|-----------|---------|---|
| Flores | Ana | 100000003 | Active | <input type="button" value="Browse..."/> <input type="button" value="Remove"/> |
| Franklin | Ben | 100000032 | Pending | |
| Yee | Francine | 100000016 | Active | |

Done

Cancel

Manage Groups

Head Office > Mangalore

Groups

Centers

Communal Banks

+ New Group

| Group Name | Office |
|------------|-------------|
| Group 1 | Head Office |
| Group 2 | Branch 1 |
| Group 3 | Head Office |
| Group 4 | Head Office |
| Group 5 | Branch 1 |
| Group 6 | Branch 2 |
| Group 7 | Branch 2 |
| Group 8 | Branch 2 |
| Group 9 | Head Office |
| Group 10 | Head Office |
| Group 11 | Head Office |
| Group 12 | Head Office |
| Group 13 | Head Office |
| Group 14 | Branch 3 |
| Group 15 | Branch 3 |
| Group 16 | Branch 3 |

New Group

Office: Head Office

Staff: -- Select Loan Officer --

Name: Group 1

ID: 001000321

Meeting:

Attach Meeting...

Activate on ___ / ___ / ____

Clients:

| | | | |
|--------|----------|----------|--------|
| Flores | Ana | 10000003 | Active |
| Yee | Francine | 10000016 | Active |

Browse...

Remove

Done

Cancel



Group 1

Branch > Center 1 > Group 1

Summary

Documents

Edit Group
 New Loan
 New Savings
 Add Note

[Back to Manage Groups](#)

Name: Group 1
Status: Active
Activation Date: 02 April 2009
Office: Bangalore
Loan Cycles: 4
Meeting Time: Every Tuesday, 9-10 am

PPI - 2.45



Recent Notes

5/5/2013 - missed meeting due to funeral

| Clients | Balance | Status |
|---|-----------|------------------------|
| Anil Ambani #0012013562 | -11,356.2 | Active in Bad Standing |
| Betty White #0012031092 | -8,245.0 | Application Approved |
| Sindhu Srinivas #0012020099 | -2,000 | Pending Approval |
| Cherry San Pietro #0012010104 | -562.0 | Active |
| Ana Flores #0012010105 | -1,000 | Active |

| Loan Accounts | Outstanding | Status |
|--|-------------|--------|
| Standard Group Loan #0023024128 | 4750.0 | Active |
| Group Livestock Loan #0023016348 | 1016 | Active |



Group 1

Branch > Center 1 > Group 1

Summary

Documents

Edit Group
 New Loan
 New Savings
 Add Note

Name: **Group 1**
 Status: Active
 Activation Date: 02 April 200
 Office: Bangalore
 Loan Cycles: 4

Clients

| | |
|-------------------|-----|
| Anil Ambani | #00 |
| Betty White | #00 |
| Sindhu Srinivas | #00 |
| Cherry San Pietro | #00 |
| Ana Flores | #00 |

Loan Accounts

| | |
|----------------------|-----|
| Standard Group Loan | #00 |
| Group Livestock Loan | #00 |

Edit Group

Office:

Staff:

Name:

ID:

Meeting:

Activated on:

Clients:

| | | | |
|------------|--------|-----------|--------|
| Ambani | Anil | 100000003 | Active |
| Flores | Ana | 100000032 | Active |
| San Pietro | Cherry | 100000016 | Active |
| Srinivas | Sindhu | 100000016 | Active |
| White | Betty | 100000016 | Active |

Recent Notes

5/5/2013 - missed meeting due to funeral

Manage Groups

Head Office > Mangalore

Groups

Centers

Communal Banks

+ New Center

Filter by: None

Search

| Center Name | Loan Officer | Office | Activation Date | Location | # of Groups |
|--------------------------|----------------|-----------|-----------------|---------------------|-------------|
| Center 1 | Harish Kumar | Mangalore | 5 May 2009 | St. Joseph's School | 3 |
| Center 2 | Harish Kumar | Mangalore | 6 June 2010 | Cubbon Road | 2 |
| Center 3 | Larry Lender | Mangalore | 7 Feb 2011 | Ganesh Temple | 3 |
| Center 4 | Larry Lender | Mangalore | 12 May 2011 | Hanuman Temple | 3 |
| Center 5 | Another Lender | Mangalore | 10 Oct 2011 | MG Road | 5 |

Manage Groups

Head Office > Mangalore

Groups

Centers

Communal Banks

+ New Center

| Center Name | Loan Officer |
|-------------|--------------|
| Center 1 | Harish Kum |
| Center 2 | Harish Kum |
| Center 3 | Larry Lende |
| Center 4 | Larry Lende |
| Center 5 | Another Ler |

New Center

Office:

Staff:

Name:

ID:

Location:

Activate on

Groups:

Browse...

Done

Cancel

Manage Groups

Head Office > Mangalore

Groups

Centers

Communal Banks

+ New Center

| Center Name | Loan Officer |
|-------------|--------------|
| Center 1 | Harish Kum |
| Center 2 | Harish Kum |
| Center 3 | Larry Lende |
| Center 4 | Larry Lende |
| Center 5 | Another Ler |

New Center

Office: Head Office

Staff: -- Select Loan Officer --

Name: Center 1

ID: 001000321

Location:

Activate on 15 / 06 / 2013

Groups:

| | | | |
|----------|-------------|---------------|-------------|
| Group 3 | Head Office | Lorenz Guz... | 5 May 2012 |
| Gr lup 4 | Head Office | Lorenz Guz... | 12 Aug 2012 |
| Group 5 | Head Office | Lorenz Guz... | 15 Sep 2012 |
| Group 6 | Head Office | Lorenz Guz... | 8 Jan 2013 |

Browse...

Done

Cancel

Manage Groups

Head Office > Mangalore

Groups

Centers

Communal Banks

+ New Center

| Center Name | Loan Officer |
|-------------|--------------|
| Center 1 | Harish Kum |
| Center 2 | Harish Kum |
| Center 3 | Larry Lende |
| Center 4 | Larry Lende |
| Center 5 | Another Ler |

Edit Center

Office: Head Office

Staff: -- Select Loan Officer --

Name: Center 1

ID: 001000321

Location:

Activated on 09 / 10 / 2012

Groups:

| | | | |
|----------|-------------|---------------|-------------|
| Group 3 | Head Office | Lorenz Guz... | 5 May 2012 |
| Gr lup 4 | Head Office | Lorenz Guz... | 12 Aug 2012 |
| Group 5 | Head Office | Lorenz Guz... | 15 Sep 2012 |
| Group 6 | Head Office | Lorenz Guz... | 8 Jan 2013 |

Browse...

Done

Cancel

Manage Groups

Head Office > Mangalore

Groups

Centers

Communal Banks

+ New Center

New Center

Office: Head Office

Filter by: Lorenz Guzman

Search

| Center Name | Loan Officer |
|-------------|---------------|
| Center 1 | Harish Kur... |
| Center 2 | Harish Kur... |
| Center 3 | Larry Lend... |
| Center 4 | Larry Lend... |
| Center 5 | Another Le... |

| Group Name | Office | Loan Officer | Activation Date | Center |
|------------|-------------|---------------|-----------------|----------|
| Group 1 | Head Office | Lorenz Guzman | Active | Center 1 |
| Group 2 | Head Office | Lorenz Guzman | Active | Center 1 |
| Group 3 | Head Office | Lorenz Guzman | Active | |
| Group 4 | Head Office | Lorenz Guzman | Active | |
| Group 5 | Head Office | Lorenz Guzman | Active | |
| Group 6 | Head Office | Lorenz Guzman | Active | |

0 groups selected

Add

Cancel

Manage Groups

Head Office > Mangalore

Groups

Centers

Communal Banks

+ New Center

New Center

Office: Head Office

Filter by: Lorenz Guzman

Search

| Center Name | Loan Officer |
|-------------|---------------|
| Center 1 | Harish Kur... |
| Center 2 | Harish Kur... |
| Center 3 | Larry Lend... |
| Center 4 | Larry Lend... |
| Center 5 | Another Le... |

| Group Name | Office | Loan Officer | Activation Date | Center |
|------------|-------------|---------------|-----------------|----------|
| Group 1 | Head Office | Lorenz Guzman | Active | Center 1 |
| Group 2 | Head Office | Lorenz Guzman | Active | Center 1 |
| Group 3 | Head Office | Lorenz Guzman | Active | |
| Group 4 | Head Office | Lorenz Guzman | Active | |
| Group 5 | Head Office | Lorenz Guzman | Active | |
| Group 6 | Head Office | Lorenz Guzman | Active | |

4 groups selected

Add

Cancel



INDIVIDUAL LENDING
TENANT: DEFAULT



Username:



Password:

Logon