

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

[Approve Loans](#)

To-Do List

May 16, 2013

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

Delinquency

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](#)

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

↓ 2.97%

Miranda Smith	3500
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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

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

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To-Do List

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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](#)

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

Branch Manager: Maria Manager

Loans Pending Approval

34

[Approve Loans](#)

To-Do List

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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](#)



- Users
- Organisation
- System

Branch Manager: Maria

Loans Pending Approval

34

[Approve Loans](#)

To-Do List

May 16, 2013

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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

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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?



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

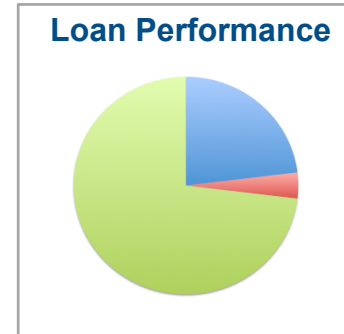
+ New Loan

+ New Savings

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](#)

- Summary
- Documents
- Additional Info

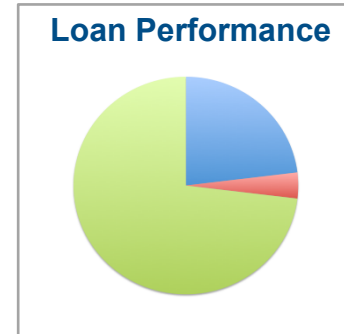
Go to Alternate Actions

- Edit Client
- + New Loan
- + New Savings

- Questions
- Notes



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



Loan Accounts		Balance	Status
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Savings Accounts		23% of loan value	
Mandatory Savings	#0023024128	4750.0	Active
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Claire Client

Branch > Center > Group > Claire Client

Summary

Documents

Additional Info

Edit Client

+ New Loan

+ New Savings

Questions

Notes

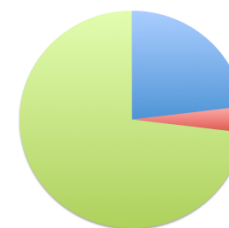


Account No.: **200152006**
 External ID: 532921843
 Activation Date: 02 April 2012
 Office: Bangalore
 Group: Triangle Group
 Loan Officer: Lorenz Guzman
 Loan Cycle: 2

PPI - 2.45



Loan Performance



Performance History

Last Loan	200
Active Loans	3
Delinquent	1,546
Total Savings	5,212
Meetings Attended	7
Meetings Missed	0
Standard Loan Cycle	2
Home Loan	1
Car Loan	0
Agricultural Loan	1
Agricultural Loan	1

Loan Accounts

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
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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

Additional Info

Edit Client

+ New Loan

+ New Savings

Questions

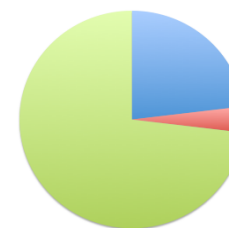


Account No.: **200152006**
 External ID: 532921843
 Activation Date: 02 April 2012
 Office: Bangalore
 Group: Triangle Group
 Loan Officer: Lorenz Guzman
 Loan Cycle: 2

PPI - 2.45



Loan Performance



Notes

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

System Admin:
Client created.
Dec. 11, 2012

Loan Accounts		Balance	Status
Standard Client Loan	#0012013562	-11,356.2	Active in Bad Standing
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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](#)
[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 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
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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

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Feb. 21, 2013

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 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

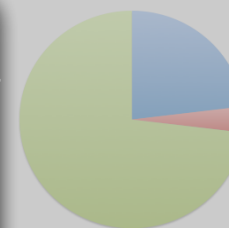
Notes



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



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

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

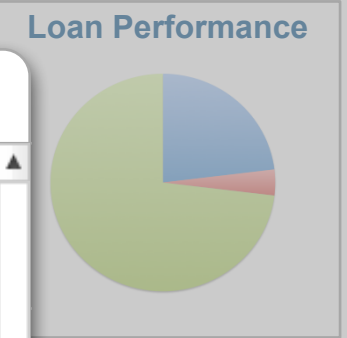
Summary Documents Additional Info

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 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

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

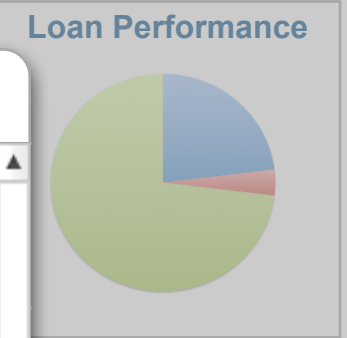
- Summary
- Documents
- Additional Info

- 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

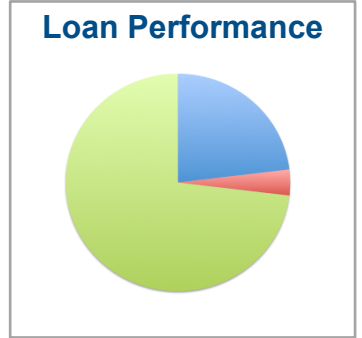
Go to Preferred Actions ?

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

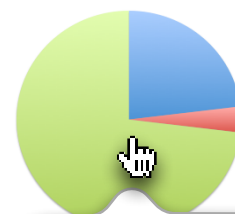


Account No.: **200152006**
 External ID: 532921843
 Activation Date: 02 April 2012
 Office: Bangalore
 Group: Triangle Group
 Loan Cycle: 2

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
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Individual Savings	#0023016348	462	Active



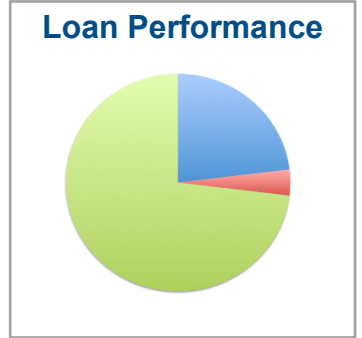
Claire Client

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
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Savings Accounts		23% of loan value	
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Individual Savings	#0023016348	462	Active

Client Details

Office: Head Office

Loan Officer: Lorenz Guzman

Personal

MFI

Questions

Given Name: given name

Family Name: family name

Government ID: identification

Salutation: --select--

Date of Birth: click for calendar

Gender: --select--

Marital Status: --select--

Number of Children: [input]

Telephone Number: telephone number

Photo: [input] Browse...

Citizenship: --select--

Ethnicity: --select--

Activities: --select--

Education Level: --select--

Handicapped: No Yes

Next of Kin: --relationship--

Given Name: given name

Family Name: family name

Save

Cancel

Client Details

Office:

Loan Officer:

Personal

MFI

Questions

MFI Information

Recruited by:

External ID:

Administrative Set Fees

Membership Fees: Once

New Client Fee: Once

Land Verification: Every 4 months

PPI Fee: Every 1 year

Other Fee: Once

Create Savings Accounts

Savings type:

Savings type:

Savings type:

Additional Fees

Fee type:

Amount:

[Add Another Fee](#)

Save

Cancel

Client Details

Office: Head Office

Loan Officer: Lorenz Guzman

Personal

MFI

Questions

Voter ID: voter ID

What is household's primary occupation?

- Professionals, technicians, clerks, administrators, managers, executives, directors, supervisors, teachers
- Laborers (agricultural, plantation, farm), hunters, tobacco makers, other
- Other

New question: question

answers

[Add another question](#)

Save

Cancel

Claire Client

Branch > Center > Group > Claire Client

Summary

Edit Client



Edit Client Details

Office: Head Office

Loan Officer: Lorenz Guzman

Personal

Given Name: Claire

Family Name: Client

Government ID: 345-21-4934

Salutation: Ms

Date of Birth: 09-Oct-1958

Gender: Female

Marital Status: Married

Number of Children: 2

Telephone Number: 54-213-321

MFI

Questions

Photo: /desktop/myphotos/clai...

Citizenship: Natural Born Citizen

Ethnicity: Indian

Activities: Agriculture

Education Level: Primary

Handicapped: No Yes

Next of Kin: Spouse

Given Name: Sanjay

Family Name: Client

Save

Cancel

Questions

Jun. vacation.

arry Lender on Jun 4,

card.



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



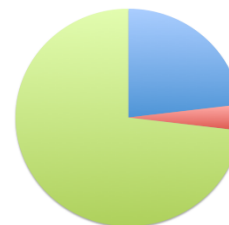
Standard Client Loan: #0012013562



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



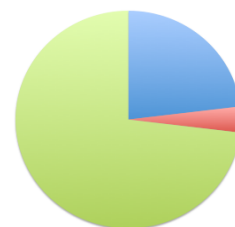
Standard Client Loan: #0012013562



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



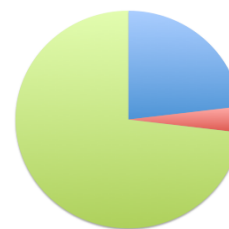
Standard Client Loan: #0012013562



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: 5/1/2013
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



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 Otwarty	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	lil	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 type="checkbox"/>	10000011	Pending Approval	Business Loan	500	3,219	May 23, 2013
<input 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 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:

Activate on

Clients:

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

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	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

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: Attach Meeting...

Activate on __/__/__

Clients:

Flores	Ana	100000003	Active	Browse... Remove
Frankln	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:

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	

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



Checker Inbox

Users

Organization

System

Branch Manager: Maria

Checker Inbox

8

View Checker Inbox

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



Checker Inbox

Filter by:

None



Search

<input type="checkbox"/>	Date	Action	Loan Officer	Office	Client	Amount	Purpose/Reason
<input type="checkbox"/>	11-Jun-2013	Approve Loan	Lorenz Guzman	Head Office	Betty White	1,000	
<input type="checkbox"/>	11-Jun-2013	Activate New Client	Lorenz Guzman	Head Office	Tina Moreno		new member of Red group
<input type="checkbox"/>	11-Jun-2013	Undo Disbursal	Sally Magalang	Head Office	Kent Clark	2,000	Govt ID invalid
<input type="checkbox"/>	10-Jun-2013	Disbursal	Sally Malagang	Head Office	Marky Mark	1,000	festival loan
<input type="checkbox"/>	10-Jun-2013	Activate New Group	Larry lender	Mysore Branch	Fantasy Group		Ban Temple Center
<input type="checkbox"/>	10-Jun-2013	Approve Loan	Larry Lender	Mysore Branch	Felicity Huffman	2,500	car loan
<input type="checkbox"/>	10-Jun-2013	Approve Loan	Sally Malagang	Head Office	Marsha Brady	10,000	home loan
<input type="checkbox"/>	10-Jun-2013	Approve Loan	Lorenz Guzman	Head Office	Patrick Leahy	3,000	agricultural loan

Showing 1-8 of 8 Checker Tasks

User

Action

Entity

Filter Menu



Checker Inbox

Filter by:

None



Search

<input type="checkbox"/>	Date	Action	Loan Officer	Office	Client	Amount	Purpose/Reason
<input checked="" type="checkbox"/>	11-Jun-2013	Approve Loan	Lorenz Guzman	Head Office	Betty White	1,000	
<input type="checkbox"/>	11-Jun-2013	Activate New Client	Lorenz Guzman	Head Office	Tina Moreno		new member of Red group
<input type="checkbox"/>	11-Jun-2013	Undo Disbursal	Sally Magalang	Head Office	Kent Clark	2,000	Govt ID invalid
<input checked="" type="checkbox"/>	10-Jun-2013	Disbursal	Sally Malagang	Head Office	Marky Mark	1,000	festival loan
<input type="checkbox"/>	10-Jun-2013	Activate New Group	Larry lender	Mysore Branch	Fantasy Group		Ban Temple Center
<input type="checkbox"/>	10-Jun-2013	Approve Loan	Larry Lender	Mysore Branch	Felicity Huffman	2,500	car loan
<input type="checkbox"/>	10-Jun-2013	Approve Loan	Sally Malagang	Head Office	Marsha Brady	10,000	home loan
<input type="checkbox"/>	10-Jun-2013	Approve Loan	Lorenz Guzman	Head Office	Patrick Leahy	3,000	agricultural loan

Showing 1-8 of 8

[Take 2 Actions](#)



Checker Inbox

Filter by:

None

Search

<input type="checkbox"/>	Date	Action	Loan Officer	Office	Client	Amount	Purpose/Reason
<input checked="" type="checkbox"/>	11-Jun-2013	Approve Loan	Lorenz Guzman	Head Office	Betty White	1,000	
<input type="checkbox"/>	11-Jun-2013	Activate New Client					new member of Red group
<input type="checkbox"/>	11-Jun-2013	Undo Disbursal				2,000	Govt ID invalid
<input checked="" type="checkbox"/>	10-Jun-2013	Disbursal				1,000	festival loan
<input type="checkbox"/>	10-Jun-2013	Activate New Group					Ban Temple Center
<input type="checkbox"/>	10-Jun-2013	Approve Loan			fman	2,500	car loan
<input type="checkbox"/>	10-Jun-2013	Approve Loan			ady	10,000	home loan
<input type="checkbox"/>	10-Jun-2013	Approve Loan			hy	3,000	agricultural loan

Showing 1-8 of 8

[Take 2 Actions](#)

Checker Actions

You have selected 1 loan and 1 disbursal to approve.

Date:

Note:

Approve

Cancel



Checker Inbox

Filter by:

None

Search


<input type="checkbox"/>	Date	Action	Loan Officer	Office	Client	Amount	Purpose/Reason
<input type="checkbox"/>	11-Jun 2013	Activate New Client	Lorenz Guzman	Head Office	Tina Moreno		new member of Red group
<input type="checkbox"/>	11-Jun-2013	Undo Disbursal	Sally Magalang	Head Office	Kent Clark	2,000	Govt ID invalid
<input type="checkbox"/>	10-Jun-2013	Activate New Group	Larry lender	Mysore Branch	Fantasy Group		Ban Temple Center
<input type="checkbox"/>	10-Jun-2013	Approve Loan	Larry Lender	Mysore Branch	Felicity Huffman	2,500	car loan
<input type="checkbox"/>	10-Jun-2013	Approve Loan	Sally Malagang	Head Office	Marsha Brady	10,000	home loan
<input type="checkbox"/>	10-Jun-2013	Approve Loan	Lorenz Guzman	Head Office	Patrick Leahy	3,000	agricultural loan

Showing 1-6 of 6 Checker Tasks



INDIVIDUAL LENDING
TENANT: DEFAULT

 Username:

 Password:

Logon