



Branch Manager: Maria Manager

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](#)



Loan Officer: Larry Lender

My Common Tasks <<

[My Dashboard](#)

[Enter Collection Sheet Data](#)

[Create New Center](#)

[Create New Group](#)

[Create New Client](#)

[Create Savings Account](#)

[Create Loan Account](#)

[Create Multiple Loan Accounts](#)

To-Do List

Wed, Jun 12, 2013

- 8:00 Red Hat Ladies at Sacred Heart Elementary
- 9:00 Wisdom Group at Sacred Heart Elementary
- 10:00 Triangle Group at Ganesh Temple
- 11:00 The Singers at Ganesh Temple
- 12:00 Enter collections at Branch Office

My New Clients

June 2013



[New Client](#)

My Delinquency

↓ 2.97%

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

Collections For:

May 16, 2013



[View Collections](#)

My Portfolio

↑ 130,000



Target 2013

[New Loan](#)

Other Loan Officer Portlet?



Loan Officer: Larry Lender

To-Do List

Wed, Jun 12, 2013

- 8:00 Red Hat Ladies at Sacred Heart Elementary
- 9:00 Wisdom Group at Sacred Heart Elementary
- 10:00 Triangle Group at Ganesh Temple
- 11:00 The Singers at Ganesh Temple
- 12:00 Enter collections at Branch Office

My New Clients

June 2013



[New Client](#)

My Delinquency

↓ 2.97%

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

Collections For:

May 16, 2013



[View Collections](#)

My Portfolio

↑ 130,000



Target 2013

[New Loan](#)

Other Loan Officer Portlet?



Branch Manager: Maria Manager

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

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](#)

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

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

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

Notifications [See All](#)

 [Larry Lender](#) has sent you a reminder to approve his loan.
 Go to: [#0012020099](#)
 Go to: [Approve Loans](#)
 5 min ago

↓ 2.97%

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

Checker Inbox

8

[View Checker Inbox](#)

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](#)



- All
- Clients
- Loans
- Reports
- Action

Branch Manager: Maria Manager

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](#)



Actions

Enter Collection Sheet Data

View Collections

Clients

Collette Morrissey

Loan Products

College Tuition

Branch Manager: Maria Manager

Checker Inbox

8

[View Checker Inbox](#)

To-Do List

May 1

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

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



Target 2013

[New Loan](#)

New Clients

May 2013

15 more

[New Client](#)



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

Branch Manager: Maria Manager

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

↓ 2.91%

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

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](#)



Settings

- Account
- Display
- Other
- Other

Dashboard Display

What components do you want to see on your dashboard?

- | | | |
|--|---|--------------------------------|
| <input checked="" type="checkbox"/> Checker Inbox | <input checked="" type="checkbox"/> Collections | <input type="checkbox"/> Other |
| <input checked="" type="checkbox"/> To-Do List | <input checked="" type="checkbox"/> Portfolio Progress | <input type="checkbox"/> Other |
| <input checked="" type="checkbox"/> Clients In Arrears | <input checked="" type="checkbox"/> New Client Progress | <input type="checkbox"/> Other |

Graph Display

Loan Performance, PPI Graph, etc...

- Display graphs with tooltips text supplement
- Display text only

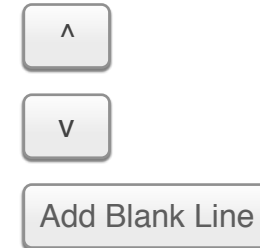
My Common Tasks

- Display My Common Tasks

- Available Tasks**
- My Dashboard
 - Create Multiple Loans
 - Create New Center
 - Create New Client
 - Create New Group
 - Enter Collection Sheet Data
 - View Loans in Bad Standing
 - Other



- My Tasks**
-





- Checker Inbox
- Manage Groups
- Organization
- System
- Users

Branch Manager: Maria M

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



[View Collections](#)

Portfolio

↑ 2,130,000



Target 2013

[New Loan](#)

New Clients

May 2013



[New Client](#)



Checker Tasks

Inbox

Search Checker Inbox



<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

Checker Tasks

Inbox

Search Checker Inbox

<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

Approve Tasks

Showing 1-8 of 8 Checker Tasks



Checker Tasks

Inbox

Search Checker Inbox

<input type="checkbox"/>	Date	Action	Loan Officer	Office	Client	Amount	Purpose/Reason
<input checked="" type="checkbox"/>	11-Jun-2013	Approve Loan				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				2,500	car loan
<input type="checkbox"/>	10-Jun-2013	Approve Loan				10,000	home loan
<input type="checkbox"/>	10-Jun-2013	Approve Loan				3,000	agricultural loan

Showing 1-8 of 8 Checker Tasks

Approve Tasks

Checker Actions

You have selected 1 loans and 1 disbursal to approve.

Date:

Note:

Checker Tasks

Inbox

1 loan approved.
1 disbursal approved.

Search Checker Inbox



<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



Checker Tasks

Inbox

Approve



<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



Checker Tasks

Inbox

Search: Approve



Approve



<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"/>	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 4 of 8 Checker Tasks



Checker Tasks

Inbox

Search: Approve



Approve



<input checked="" 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 checked="" type="checkbox"/>	10-Jun-2013	Approve Loan	Larry Lender	Mysore Branch	Felicity Huffman	2,500	car loan
<input checked="" type="checkbox"/>	10-Jun-2013	Approve Loan	Sally Malagang	Head Office	Marsha Brady	10,000	home loan
<input checked="" type="checkbox"/>	10-Jun-2013	Approve Loan	Lorenz Guzman	Head Office	Patrick Leahy	3,000	agricultural loan

Approve Loans

Showing 4 of 8 Checker Tasks



Checker Tasks

Approve

Inbox

Search: Approve

<input checked="" type="checkbox"/>	Date	Action
<input checked="" type="checkbox"/>	11-Jun-2013	Approve Loan
<input checked="" type="checkbox"/>	10-Jun-2013	Approve Loan
<input checked="" type="checkbox"/>	10-Jun-2013	Approve Loan
<input checked="" type="checkbox"/>	10-Jun-2013	Approve Loan

Approve Loans

Checker Actions

You have selected 4 loans to approve.

Date:

Note:

Approve

Cancel

Loan Officer	Office	Client	Amount	Purpose/Reason
			1,000	
		han	2,500	car loan
		y	10,000	home loan
		y	3,000	agricultural loan

Showing 4 of 8 Checker Tasks



Checker Tasks

Search Checker Inbox

Inbox



4 loans approved.

<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	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

Showing 1-4 of 4 Checker Tasks

Clients

 [New Client](#)



Client Number	Family Name	Given Name	Status	Loan Officer	Loan Balance	Another Column?
10000001	San Pietro	Cherry	Active	Lorenz Guzman	0.0	
10000002	Cipriano	Maria	Active	Lorenz Guzman	0.0	
10000003	Flores	Ana	Inactive	Lorenz Guzman	0.0	
10000004	Johnson	Kate T.	Active	Lorenz Guzman	2132.0	
10000005	Yee	Francine	Active	Lorenz Guzman	212.0	
10000006	White	Betty	Active	Sally Magalang	3214.5	
10000007	Frau	Madeline	Active	Sally Magalang	521.6	
10000008	Hermanson	Ken	Active	Sally Magalang	1324.0	
10000009	Whit	Janet	Active	Sally Magalang	45,313.0	
10000010	Franklin	Ben	Active	Sally Magalang	314.2	
10000011	White	Michael	Inactive	Lorenz Guzman	0.0	
10000012	Robinson	Jennifer	Active	Lorenz Guzman	212.0	
10000013	Caballero	Donia	Active	Lorenz Guzman	2352.0	
10000014	Alvarez	Livia	Active	Lorenz Guzman	322.4	
10000015	Valdez	Bryan	Active	Lorenz Guzman	1576.0	
10000016	Merquez	Juanita	Active	Lorenz Guzman	656.0	
10000017	Srinivas	Sindhu	Active	Aditya Adimari	5423.0	
10000018	Rayadu	Radhika	Active	Aditya Adimari	432.1	
10000019	Sharangpani	Madhura	Active	Aditya Adimari	5313.4	
10000020	Rajaraman	Ravi	Active	Aditya Adimari	431.3	



Clients

[New Client](#)



My Common Tasks <<

[My Dashboard](#)
[Enter Collection Sheet Data](#)
[Create New Center](#)
[Create New Group](#)
[Create New Client](#)
[Create Savings Account](#)
[Create Loan Account](#)
[Create Multiple Loan Accounts](#)

Client Number	Family Name	Given Name	Status	Loan Officer	Loan Balance	Another Column?
10000001	San Pietro	Cherry	Active	Lorenz Guzman	0.0	
10000002	Cipriano	Maria	Active	Lorenz Guzman	0.0	
10000003	Flores	Ana	Inactive	Lorenz Guzman	0.0	
10000004	Johnson	Kate T.	Active	Lorenz Guzman	2132.0	
10000005	Yee	Francine	Active	Lorenz Guzman	212.0	
10000006	White	Betty	Active	Sally Magalang	3214.5	
10000007	Frau	Madeline	Active	Sally Magalang	521.6	
10000008	Hermanson	Ken	Active	Sally Magalang	1324.0	
10000009	Whit	Janet	Active	Sally Magalang	45,313.0	
10000010	Franklin	Ben	Active	Sally Magalang	314.2	
10000011	White	Michael	Inactive	Lorenz Guzman	0.0	
10000012	Robinson	Jennifer	Active	Lorenz Guzman	212.0	
10000013	Caballero	Donia	Active	Lorenz Guzman	2352.0	
10000014	Alvarez	Livia	Active	Lorenz Guzman	322.4	
10000015	Valdez	Bryan	Active	Lorenz Guzman	1576.0	
10000016	Merquez	Juanita	Active	Lorenz Guzman	656.0	
10000017	Srinivas	Sindhu	Active	Aditya Adimari	5423.0	
10000018	Rayadu	Radhika	Active	Aditya Adimari	432.1	
10000019	Sharangpani	Madhura	Active	Aditya Adimari	5313.4	
10000020	Rajaraman	Ravi	Active	Aditya Adimari	431.3	

Showing 1-20 of 1,249 Objects

[Prev](#)
[1](#)
[2](#)
[3](#)
[4](#)
[5](#)
[6](#)
[...](#)
[21](#)
[22](#)
[Next](#)

Clients

New Client

New Client

Office: Head Office

Group: -- select group --

Group field appears only if Groups/Centers are configured.

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

Clients

[New Client](#)

i You have successfully created a new client.
Click client in table to view details and create loans.

Suggested next steps:
[Create Loan Account for this client](#)
[Create Savings Account for this client](#)

Clicking the links will navigate (neither currently work) clicking anywhere else will make the notification go away

My Common Tasks

[My Dashboard](#)

- [Enter Collection Sheet Data](#)
- [Create New Center](#)
- [Create New Group](#)
- [Create New Client](#)
- [Create Savings Account](#)
- [Create Loan Account](#)
- [Create Multiple Loan Accounts](#)

				Status	Loan Officer	
10000002	Cipriano	Maria		Active	Lorenz Guzman	0.0
10000003	Flores	Ana		Inactive	Lorenz Guzman	0.0
10000004	Johnson	Kate T.		Active	Lorenz Guzman	2132.0
10000005	Yee	Francine		Active	Lorenz Guzman	212.0
10000006	White	Betty		Active	Sally Magalang	3214.5
10000007	Frau	Madeline		Active	Sally Magalang	521.6
10000008	Hermanson	Ken		Active	Sally Magalang	1324.0
10000009	Whit	Janet		Active	Sally Magalang	45,313.0
10000010	Franklin	Ben		Active	Sally Magalang	314.2
10000011	White	Michael		Inactive	Lorenz Guzman	0.0
10000012	Robinson	Jennifer		Active	Lorenz Guzman	212.0
10000013	Caballero	Donia		Active	Lorenz Guzman	2352.0
10000014	Alvarez	Livia		Active	Lorenz Guzman	322.4
10000015	Valdez	Bryan		Active	Lorenz Guzman	1576.0
10000016	Merquez	Juanita		Active	Lorenz Guzman	656.0
10000017	Srinivas	Sindhu		Active	Aditya Adimari	5423.0
10000018	Rayadu	Radhika		Active	Aditya Adimari	432.1
10000019	Sharangpani	Madhura		Active	Aditya Adimari	5313.4
10000020	Rajaraman	Ravi		Active	Aditya Adimari	431.3



Clients

Client Number

10000001

10000002

10000003

10000004

10000005

10000006

10000007

10000008

10000009

10000010

10000011

10000012

10000013

10000014

10000015

10000016

10000017

10000018

10000019

10000020

New Client

Office: Head Office

Group: -- select group --

Loan Officer: Lorenz Guzman

Personal

MFI

Questions

Given Name: given name

Photo: [input] Browse...

Family Name: family name

Citizenship: --select--

Government ID: identification

Ethnicity: --select--

Salutation: --select--

Activities: --select--

Date of Birth: click for calendar

Education Level: --select--

Gender: --select--

Handicapped: No Yes

Marital Status: --select--

Next of Kin: --relationship--

Number of Children: [input]

Given Name: given name

Telephone Number: telephone number

Family Name: family name

Save

Cancel

Group field appears only if Groups/Centers are configured.

Clients

Client Number

10000001

10000002

10000003

10000004

10000005

10000006

10000007

10000008

10000009

10000010

10000011

10000012

10000013

10000014

10000015

10000016

10000017

10000018

10000019

10000020

New Client

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



Clients

Client Number

10000001

10000002

10000003

10000004

10000005

10000006

10000007

10000008

10000009

10000010

10000011

10000012

10000013

10000014

10000015

10000016

10000017

10000018

10000019

10000020

New Client

Office:

Loan Officer:

Personal

MFI

Questions

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:

[Add another question](#)

Save

Cancel



Claire Client

Branch > Center > Group > Claire Client

Summary

Documents

Additional Info

Edit Client
 New Loan
 New Savings
 Actions

Questions
 Notes



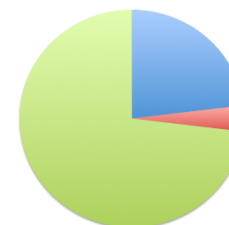
Account No.: **200152006**
 External ID: 532921843
 Activation Date: 02 April 2012
 Office: Bangalore
 Group: Triangle Group
 Loan Officer: Lorenz Guzman
 Loan Cycle: 2

PPI - 2.45



12-Dec-2012

Loan Performance



Total Balance: -21,163

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	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

What data should go in Performance history?

Claire Client

Branch > Center > Group > Claire Client

- Summary
- Documents
- Edit Client



Edit Client

Office: Head Office

Loan Officer: Lorenz Guzman

Personal

MFI

Questions

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

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

uld go in Performance



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

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

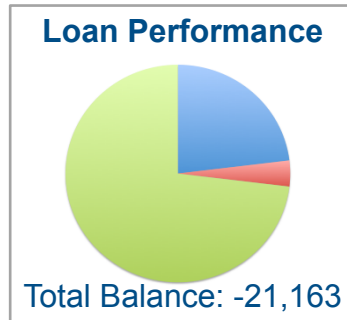
[Edit Client](#)
[+ New Loan](#)
[+ New Savings](#)
[Actions](#)

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

- Edit Client
- New Loan
- New Savings
- View Closed Accounts
- Edit Personal Information
- Edit MFI Information
- Edit Group Membership
- Attach A Question Group
- View Summarized Historical Data
- View Change Log



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			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

What data should go in Performance history?



Claire Client

Branch > Center > Group > Claire Client

Summary

Documents

Additional Info

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

[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



12-Dec-2012

Loan Perform



Total Balance:

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
Home Loan #0012031092	-8,245.0	Application Approved
Car Loan #0012020099	-2,000	Pending Approval
Agriculture Loan #0012010104	-562.0	Active
Agricuture Loan #0012010105	-1,000	Active

Savings Accounts	Balance	Status
23% of loan value		
Mandatory Savings #0023024128	4750.0	Active
Individual Savings #0023016348	462	Active

Home Loan	1
Car Loan	0
Agricultural Loan	1
Agricultural Loan	1



Claire Client

Branch > Center > Group > Claire Client

Summary

Documents

Additional Info

Edit Client

+ New Loan

+ New Savings

Actions

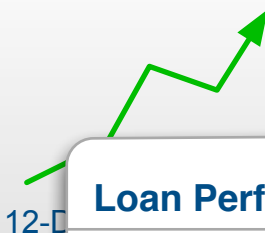
Questions

Notes

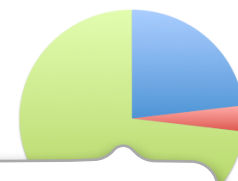


Account No.: **200152006**
 External ID: 532921843
 Activation Date: 02 April 2012
 Office: Bangalore
 Group: Triangle Group
 Loan Officer: Lorenz Guzman
 Loan Cycle: 2

PPI - 2.45



Loan Performance



Loan Performance

Total Loan Amount 28,000
 Balance owed: 21,163
 In Arrears: 546
 Paid: 6,837
 Due this week: 611

Loan Accounts

Loan Accounts	Balance	
Standard Client Loan #0012013562	-11,356.2	
Home Loan #0012031092	-8,245.0	
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

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



Claire Client

Branch > Center > Group > Claire Client

Summary Documents Additional Info

Edit Client + New Loan + New Savings Actions

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

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 (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 Performance	
Total Balance:	-21,163
Approved	★
Standing	👎
Approval	🕒
	✅
	✅
	✅
	✅

Performance History	
Fast 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



Claire Client

Branch > Center > Group > Claire Client

Summary Documents Additional Info

Edit Client + New Loan + New Savings Actions

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

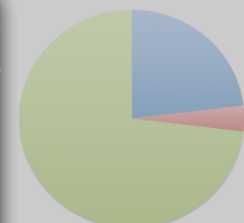
Loan Accounts

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

Savings Accounts

Mandatory Savings	#00230
Individual Savings	#00230

Loan Performance



Total Balance: -21,163

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

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



Claire Client

Branch > Center > Group > Claire Client

Summary

Documents

Additional Info

Edit Client

+ New Loan

+ New Savings

Actions

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

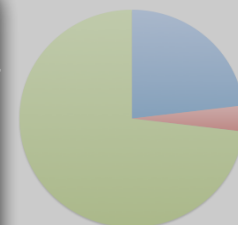
Loan Accounts

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

Savings Accounts

Mandatory Savings	#00230
Individual Savings	#00230

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

Client Notes (8)

+ Add Note

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



Claire Client

Branch > Center > Group > Claire Client

Summary

Documents

Additional Info

Edit Client

+ New Loan

+ New Savings

Actions

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

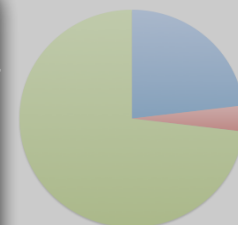
Loan Accounts

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

Savings Accounts

Mandatory Savings	#00230
Individual Savings	#00230

Loan Performance



Total Balance: -21,163

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

Client Notes (7)

+ Add Note

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

8 notifications



Claire Client

Branch > Center > Group > Claire Client

Summary

Documents

Additional Info

Standard Client Loan:
#0012013562

Make Payment

Summary

Charges

Schedule

Transactions

Loan Docs

Actions



Standard Client Loan: #0012013562

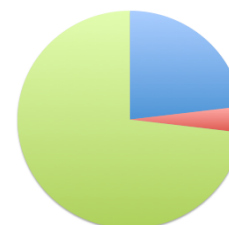


Active in Bad Standing

In Arrears: 1,256

Loan Officer: Larry Lender

Loan Performance



Total Balance: -11,532.9

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

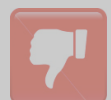
Transactions

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

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](#)
[Additional Info](#)
 Standard Client Loan: #0012013562

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

[Questions](#)
[Notes](#)



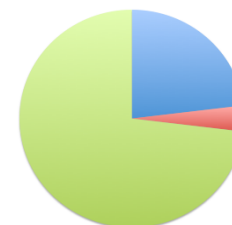
Account No.: **200152006**
 External ID: 532921843
 Activation Date: 02 April 2012
 Office: Bangalore
 Group: Triangle Group
 Loan Officer: Lorenz Guzman
 Loan Cycle: 2

PPI - 2.45



12-Dec-2012

Loan Performance



Total Balance: -21,163

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	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
Agricuture 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](#)

Savings Account:
#0023024128

New Savings |
 Deposit |
 Withdrawal |
 Actions

Notes

Mandatory Savings - #0023024128

Product: Mandatory Savings Account
 Currency: Indian Rupees
 Annual Interest: 12%
 Status: Active
 Activation Date: 11 June 2011
 Account Balance: 110.00

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	

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



Claire Client

Branch > Center > Group > Claire Client

Summary

Documents

Additional Info

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



Total Balance: -2718.3

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

My Common Tasks

My Dashboard

- [Enter Collection Sheet Data](#)
- [Create New Center](#)
- [Create New Group](#)
- [Create New Client](#)
- [Create Savings Account](#)
- [Create Loan Account](#)
- [Create Multiple Loan Accounts](#)

Summary

Documents

Additional Info

Standard Loan:
#0010001611



Approve Loan

Summary

Charges

Schedule

Transactions

Loan Docs



Actions



Standard Loan - #0010001611



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

Loan Performance



Total Balance: -2718.3

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

Additional Info

Standard Client Loan:
#0012013562

Car Loan:
#0012027323



Approve Loan

Summary

Charges

Schedule

Transactions

Loan Docs

Actions

Car Loan - #0012027323

Repayment Schedule

#	# Days	Date	Loan Amount and Balance			Total Cost of Loan			Installment Totals					
			Disbursement	Principal	OLB	Interest	Fees	Penalties	Due	Paid	Advance	Late	Outstanding	
0		11 June 2013	1,000.00		1,000.00		0.00		0.00					0.00
1	30	11 July 2013		70.46	929.54	30.00	0.00	0.00	100.46	0.00	0.00	0.00		100.46
2	31	11 Aug 2013		72.57	856.97	27.89	0.00	0.00	100.46	0.00	0.00	0.00		100.46
3	31	11 Sept 2013		74.57	782.22	25.71	0.00	0.00	100.46	0.00	0.00	0.00		100.46
4	30	11 Oct 2013		76.99	705.23	23.47	0.00	0.00	100.46	0.00	0.00	0.00		100.46
5	31	11 Nov 2013		79.30	625.93	21.16	0.00	0.00	100.46	0.00	0.00	0.00		100.46
6	30	11 Dec 2013		81.69	544.24	18.78	0.00	0.00	100.47	0.00	0.00	0.00		100.47
7	31	11 Jan 2014		84.14	460.10	16.33	0.00	0.00	100.47	0.00	0.00	0.00		100.47
8	31	11 Feb 2014		86.66	373.44	13.80	0.00	0.00	100.46	0.00	0.00	0.00		100.46
9	28	11 Mar 2014		89.27	284.17	11.20	0.00	0.00	100.47	0.00	0.00	0.00		100.47
10	31	11 Apr 2014		91.93	192.24	8.53	0.00	0.00	100.46	0.00	0.00	0.00		100.46
11	30	11 May 2014		94.70	97.54	5.77	0.00	0.00	100.47	0.00	0.00	0.00		100.47
12	31	11 June 2014		97.54	0.00	2.93	0.00	0.00	100.47	0.00	0.00	0.00		100.47
365		Total	1,000.00	1,000.00		205.57	0.00	0.00	1,205.57	0.00	0.00	0.00		1,205.57



Claire Client

Branch > Center > Group > Claire Client

Summary

Doc

You do not have permission to approve this loan. Would you like to send a reminder to the approver now?
[Yes](#) [No](#)

Approve Loan



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

Loan Performance



Total Balance: -2718.3

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
- Additional Info
- Car Loan: #0012027323**

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

- Approve Loan
- Reminder to approve this loan sent to Maria Manager.
- Loan Docs
- Actions



Car Loan - #0012027323



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

Loan Performance



Total Balance: -2718.3

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	

Loans

 [New Loan](#)

Search Loans



Loan Number	Loan Status	Loan Product	Principal	Total Outstanding	Overdue	Another Column?
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	Active	Business Loan	500	3,219	0	
10000012	Pending Approval	Business Loan	1000	3,500	0	
10000013	Active	Business Loan	500	4,211	0	
10000014	Active	Home Loan	5000	34,211	0	
10000015	Active	Home Loan	1000	24,169	0	
10000016	Approved	Car Loan	500	3,400	0	
10000017	Pending approval	Business Loan	400	2,000	0	
10000018	Approved	Business Loan	500	2,000	0	
10000019	Active	Festival Loan	100	1000	0	
10000020	Active	Emergency Loan	100	1000	100	

New Loan

1. Select Client(s)

2. Select Loan Product

3. Customize Loan

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

Office:

-- OR --

Loan Officer:

Group:

Client:

Office and loan officer filled in based on user. Can select a group and/or client.

Or search - typing will auto-fill as seen on next screen.

Seems this workflow calls for an actual wizard.

Next is disabled until a valid selection is made.

<< Back Next >> Cancel

Loans

Loan Nu

1000000

1000000

1000000

1000000

1000000

1000000

1000000

1000000

1000000

1000000

1000000

1000000

1000000

1000000

1000000

1000000

1000000

1000000

1000000

1000000

1000000

New Loan

1. Select Client(s)

2. Select Loan Product

3. Customize Loan

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

Office:

-- OR --

Loan Officer:

Miranda Group (8)

Group:

Miriam Gonzalez

Client:

Chad Mirthi

Mirror Temple (35)

Emirates (8)

Selection can be both group and client, or group only or client only.

Typing "Mir" will find all instances of clients, groups, or centers containing this group of letters. A number in parenthesis indicates how many clients are in that group or center.

User would do only one of these two selections at any given time.

Selected: **Miriam Group (8)**

Selection is verified with text. Next button is enabled.

<< Back

Next >>

Cancel

New Loan

1. Select Client(s)

2. Select Loan

3. Customize Loan

Select the loan type and loan product. If choosing a client loan, select the individual clients to receive the loan.

Client Loan: Group Loan:

Loan Product: --select--

Office: Head Office
Loan Officer: Lorenz Guzman
Group: Miranda Group

Select Client or Group loan, then Loan Product list changes to fit the loan type.

If a group is selected on the previous page, group loan is selected here. But user can still choose an individual (or individuals) for a client loan.

<< Back Next >> Cancel

Loans

Loan Num

- 100000001
100000002
100000003
100000004
100000005
100000006
100000007
100000008
100000009
100000010
100000011
100000012
100000013
100000014
100000015
100000016
100000017
100000018
100000019
100000020

Active

Emergency Loan

100

1000

100

New Loan

1. Select Client(s)

2. Select Loan

3. Customize Loan

Select the loan type and loan product. If choosing a client loan, select the individual clients to receive the loan.

Client Loan: Group Loan:

Loan Product: Standard Loan

Office: Head Office
Loan Officer: Lorenz Guzman
Group: Miranda Group

User choose Group Loan and Standard Loan - list of clients appears below. Default is all checked.

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

<< Back Next >> Cancel

Loans

Loan Num

- 100000001
- 100000002
- 100000003
- 100000004
- 100000005
- 100000006
- 100000007
- 100000008
- 100000009
- 100000010
- 100000011
- 100000012
- 100000013
- 100000014
- 100000015
- 100000016
- 100000017
- 100000018
- 100000019
- 100000020

Active

Emergency Loan

100

1000

100

New Loan

1. Select Client(s)

2. Select Loan

3. Customize Loan

Select the loan type and loan product. If choosing a client loan, select the individual clients to receive the loan.

Client Loan: Group Loan:

Loan Product: Car Loan

User chose Client Loan and Car Loan - list of clients appears below. Default is all unchecked.

Office: Head Office
Loan Officer: Lorenz Guzman
Group: Miranda Group

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

<< Back Next >> Cancel

Active Emergency Loan 100 1000 100

New Loan

1. Select Client(s)

2. Select Loan

3. Customize Loan

Select the loan product for this client.

Client Loan for Betty White

Loan Product: -- select --

User chose individual client on previous page. Only need to select a Loan Product here.

Office: Head Office
Loan Officer: Lorenz Guzman
Group: Miranda Group

Next is disabled until a loan product selection is made.

<< Back

Next >>

Cancel

Loans

Loan Num

100000001

100000002

100000003

100000004

100000005

100000006

100000007

100000008

100000009

100000010

100000011

100000012

100000013

100000014

100000015

100000016

100000017

100000018

100000019

100000020

Active

Emergency Loan

100

1000

100

Mifos - Individual Lending

https://demo.openmf.org

Mifos Clients Loans Administration Accounting Reports All Search UserName

Loans [New Loan](#) Search Loans

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

Showing 1-20 of 1,249 Objects Prev 1 2 3 4 5 6 ... 21 22 Next

New Loan

1. Select Client(s) 2. Select Loan 3. Customize Loan

Loan Product: Group Loan Monthly

Group Meeting: Every Monday Starting 24 Jun 2013

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

Loan Terms:
Amount: 10,000.00
Loan Term: 12 Months
Repaid Every: 1 Months
Interest Rate %: 3 Per Month
Expected Disbursal Date: -- select date --
Interest charged from: -- select date --
First repayment on: -- select date --

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

Next is disabled until all required fields are filled in.

<< Back Next >> Cancel

New Loan

1. Select Client(s) 2. Select Loan 3. Customize Loan

Loan Product: Group Loan Monthly

Group Meeting: Every Monday Starting 24 Jun 2013

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

-- select loan fee -- + Add

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

Next is disabled until all required fields are filled in.

<< Back Next >> Cancel

How to do charges?

Loans

[New Loan](#)

Pending

Loan Number	Loan Status	Loan Product	Principal	Total Outstanding	Overdue	Another Column?
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	Active	Business Loan	500	3,219	0	
10000012	Pending Approval	Business Loan	1000	3,500	0	
10000013	Active	Business Loan	500	4,211	0	
10000014	Active	Home Loan	5000	34,211	0	
10000015	Active	Home Loan	1000	24,169	0	
10000016	Approved	Car Loan	500	3,400	0	
10000017	Pending approval	Business Loan	400	2,000	0	
10000018	Approved	Business Loan	500	2,000	0	
10000019	Active	Festival Loan	100	1000	0	
10000020	Active	Emergency Loan	100	1000	100	



Loans

[New Loan](#)

Pending

<input type="checkbox"/>	Loan Number	Loan Status	Loan Product	Principal	Total Outstanding	Overdue	Purpose/Reason
<input type="checkbox"/>	11-Jun-2013	Approve Loan	Lorenz Guzman	Head Office	Betty White	1,000	
<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 4 of 8 Checker Tasks



Claire Client

Branch > Center > Group > Claire Client

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



Total Balance: -2718.3

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

Additional Info

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:

Note:

Approve

Cancel

Account Summary

Principal	
Interest	
Fees	
Penalty	
Total	

Loan Performance

Balance	2,718.3
	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

Additional Info

Car Loan:
#0012027323



Approve



Reject

Summary

Charges

Schedule

Transactions

Loan Docs



Actions



Car Loan - #0012027323



Pending Approval
Disbursal Date: 5/...
Loan Officer: Larry

Reject Loans

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

Date:

Note:

Reject

Cancel

Account Summary

Principal
Interest
Fees
Penalty
Total

Loan Performance

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

Additional Info

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



Total Balance: -2718.3

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

Additional Info

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



Total Balance: -2718.3

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	

Loans



Approve



Reject

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:

Note:



Loans

Approve

Reject

Filter by:

Pending Approval

Search

<input type="checkbox"/>	Loan Number	Loan Status	Loan Product	Principal	Total Outstanding	Date Submitted
<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



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

Group 100	Collections							Issues/Withdrawals							A/C Collections	Attendance
	ADM	ADM3	LTL	dbir	MS1	SA	DCF	ADM	ADM3	LTL	dbir	MS1	SA	DCF		
Komic Batmana						<input type="text" value="1000.0"/>							<input type="text" value="0.0"/>		<input type="text" value="0.0"/>	Present
Tymteusk Otworthy	<input type="text" value="2513.0"/>					<input type="text" value="0.0"/>							<input type="text" value="0.0"/>		<input type="text" value="2.0"/>	Late
Mohamed Adil			<input type="text" value="115.0"/>			<input type="text" value="0.0"/>							<input type="text" value="0.0"/>		<input type="text" value="23.0"/>	Absent
Group Account(s)															<input type="text" value="0.0"/>	
Group Total	<input type="text" value="2513.0"/>	<input type="text" value="0.0"/>	<input type="text" value="115.0"/>	<input type="text" value="0.0"/>	<input type="text" value="0.0"/>	<input type="text" value="0.0"/>	<input type="text" value="0.0"/>	<input type="text" value="0.0"/>	<input type="text" value="0.0"/>	<input type="text" value="0.0"/>	<input type="text" value="0.0"/>	<input type="text" value="0.0"/>	<input type="text" value="0.0"/>	<input type="text" value="0.0"/>	<input type="text" value="25.0"/>	

Group ABC	Collections							Issues/Withdrawals							A/C Collections	Attendance
	ADM	ADM3	LTL	dbir	MS1	SA	DCF	ADM	ADM3	LTL	dbir	MS1	SA	DCF		
Morgana Clemens		<input type="text" value="684.2"/>				<input type="text" value="0.0"/>							<input type="text" value="0.0"/>		<input type="text" value="0.0"/>	Approved
Betty White		<input type="text" value="367.2"/>				<input type="text" value="0.0"/>							<input type="text" value="0.0"/>		<input type="text" value="0.0"/>	Present
Marty McFly		<input type="text" value="3218.4"/>	<input type="text" value="170.1"/>	<input type="text" value="2000.0"/>		<input type="text" value="0.0"/>	<input type="text" value="500.0"/>						<input type="text" value="0.0"/>		<input type="text" value="0.0"/>	Present
Anna Bednar													<input type="text" value="0.0"/>		<input type="text" value="0.0"/>	Present
Group Account(s)															<input type="text" value="0.0"/>	
Group Total	<input type="text" value="0.0"/>	<input type="text" value="3218.4"/>	<input type="text" value="170.1"/>	<input type="text" value="2000.0"/>	<input type="text" value="0.0"/>	<input type="text" value="0.0"/>	<input type="text" value="500.0"/>	<input type="text" value="0.0"/>	<input type="text" value="0.0"/>	<input type="text" value="0.0"/>	<input type="text" value="0.0"/>	<input type="text" value="0.0"/>	<input type="text" value="0.0"/>	<input type="text" value="0.0"/>	<input type="text" value="0.0"/>	

Total Collections

Due Collections:	<input type="text" value="67828.1"/>
Other Collections:	<input type="text" value="25.0"/>
Total:	<input type="text" value="67853.1"/>

Total Issues/Withdrawals

Loan Disbursements:	<input type="text" value="0.0"/>
Withdrawals:	<input type="text" value="0.0"/>
Total:	<input type="text" value="0.0"/>

Net Cash:



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



Organization

Search Organization

All



Loan Products

Savings Products

Funds

Charges

Accounting Rules

Offices

Employees

Bulk Loan Reassignment

Currency Configuration

1

Select an administrative topic from the list below, or click on the tabs above to view, edit, and add objects.

[Loan Products](#)

[Savings Products](#)

[Funds](#)

[Charges](#)

[Accounting Rules](#)

[Office](#)

[Employees](#)

[Currency Configuration](#)

[Bulk Loan Reassignment](#)

Optional Header Page

we could add this page to help the user learn this new format (or not, if it seems unnecessary)

1. This page could be closed once user doesn't need it anymore (or doesn't use it)
Not sure if/where you would turn it back on.



System

Search Organization

All



Global Configuration

Maker-Checker

Permissions

Reports

Data Tables

Code

Audit

1

Select an administrative topic from the list below, or click on the tabs above to view, edit, and add objects.

[Global Configuration](#)

[Maker-Checker](#)

[Permissions](#)

[Reports](#)

[Data Tables](#)

[Code](#)

[Audit](#)

Optional Header Page

we could add this page to help the user learn this new format (or not, if it seems unnecessary)

1. This page could be closed once user doesn't need it anymore (or doesn't use it)
Not sure if/where you would turn it back on.



Users

Search Users

- Users
- Roles**
- Permissions

+ New Role ✖ Delete Role(s)

Role	Description
Admin	Pretty much can do everything
Branch Manager	Can do everything except configuration and system information management
Data Entry	Can do most things except approvals, product definitions
Loan Officer	Cannot do configuration and system information management, product definitions
Operations Manager	Can do client management, loan and savings management
Report Specialist	Can only manage reports

Users

New Role

Role Name:

Description:

- **Organization Management** funds, fees, checklists, penalties, month close, etc
- **Office Management** create/modify offices
 - Offices
 - Can create new office
 - Can modify office information
 - Can modify office heirarchy
- **User Management** create/modify users and roles
- **Client Management** create/modify clients, groups, and centers
- **Product Definition** create/modify categories, loans, savings, product mix
- **Loan Management** loan processing and transactions
- **Savings Management** [manage savings accounts](#)
- **Reports Management** reports
- **Bulk Tasks**
- **Configuration Management**
- **System Information**

Prefer a long table with heirarchical check boxes (as in 2.6) to the new version using tabs. Too hard to compare and see how many tasks a role has. Table should contain expand/collapse icons for each category level.

Save Cancel



Organization

Search Organization

Loan Products

Savings Products

Funds

Charges

Accounting Rules

Offices

Employees

Bulk Loan Reassignment

Currency Configuration

+ New Loan Product

Loan Product Name	Fund	Restrictions?	Heading
Standard Loan			
Personal Loan			
Agricultural Loan			
Car Loan		Another Car Loan	
Home Loan			
Festival Loan			
Emergency Loan			
Business Loan		Emergency Loan, Per...	

Show product mix products (i.e. cannot have "Another" car loan if you have one)

List of products restricted (not allowed) for this loan type. Clicking link goes to Product Mix List



Organization

Search Organization

Loan Products

Savings Products

Product Restrictions

Funds

Charges

Accounting Rules

Offices

Employees

Bulk Loan Reassignment

Currency Configuration

+ New Loan Product

Loan Product Name	Fund	Restrictions?	Heading
Standard Loan			
Personal Loan			
Agricultural Loan			
Car Loan		Another Car Loan	
Home Loan			
Festival Loan			
Emergency Loan			
Business Loan		Emergency Loan, Per...	

Show product mix products (i.e. cannot have "Another" car loan if you have one)

List of products restricted (not allowed) for this loan type. Clicking link goes to Product Mix List

Organization

New Loan Product

Details

Charges

Two tabs - put all fields on Details page except charges, since they add lines to the dialog (and are kind of optional). Easier to parse when you can see everything that needs to be set.

Name

Loan Name:

Description:

Fund: ▼

Terms

Currency: ▼

Decimal Places:

Principal:
Minimum Default Maximum

Repayments:
Minimum Default Maximum

Repaid Every: ▼

Nominal Interest rate percentage: ▼
Minimum Default Maximum

Settings

Amortization: Equal Installments
 Equal Principal Installments

Interest Method: Declining Balance
 Flat

Interest Calculation Period: Same as repayment period
 Daily

Arrears tolerance: ▼

Repayment Strategy: ▼

Grace:
On Principal On Interest

Interest-Free Period:

Accounting

Accounting Rules: None
 Cash

Organization

New Loan Product

Details

Charges

<input type="checkbox"/>	Charges	Currency	Amount	Type	Collected On	Penalty
<input type="checkbox"/>	Application Fee	Indian Rupee	3	% of amount	Disbursement	No
<input type="checkbox"/>	Disbursement Fee	Indian Rupee	1	% of amount	Specified Due Date	No
<input type="checkbox"/>	Late Fee	Indian Rupee	100	Flat	Specified Due Date	Yes
<input type="checkbox"/>	Processing Fee	Indian Rupee	100	Flat	Specified Due Date	No

Seems this page should be organized as a table with check boxes, unless there is a reason we should allow user to select same charge more than once? (or should be prevent that?)

Save

Cancel



Organization

Search Organization

Loan Products

Savings Products

Funds

Charges

Accounting Rules

Offices

Employees

Bulk Loan Reassignment

Currency Configuration

+ New Savings Product

Savings Product Name	Heading	Heading	Heading
Passbook Savings			
CD			
Savings 1			
Savings 2			

Organization

New Savings Product

Name

Savings Name:

Description:

Terms

Currency:

Decimal Places:

Interest compounding period:

Interest posting period:

Interest calculated using: Daily Balance Average Daily Balance

Interest calculated with (Days in Year): 365 days 360 days

Settings

Minimum opening balance:

Locked in for:

Withdrawal fee: Flat % of Amount

Annual fee:

collected on:

Accounting

Accounting Rules: None Cash

see alternate layout

Save

Cancel

Organization

New Savings Product

Name

Savings Name:

Description:

Terms

Currency:

Decimal Places:

Interest compounding period:

Interest posting period:

Interest calculated using: Daily Balance Average Daily Balance

Interest calculated with (Days in Year): 365 days 360 days

Accounting

Accounting Rules: None Cash

Settings

Minimum opening balance:

Locked in for:

Withdrawal fee: Flat % of Amount

Annual fee:
collected on:

1. Alternate layout - accounting aligned with name to make layout easier to read

see alternate layout

Save Cancel



Organization

Search Organization

- Loan Products
- Savings Products
- Product Restrictions**
- Funds
- Charges
- Accounting Rules
- Offices
- Employees
- Bulk Loan Reassignment
- Currency Configuration

+ Define Product Restrictions

Loan Product Name	Restrictions
Standard Loan	None
Personal Loan	None
Agricultural Loan	None
Car Loan	Car Loan
Home Loan	None
Festival Loan	None
Emergency Loan	None
Business Loan	Emergency Loan Personal Loan



Organization

Search Organization

- Loan Products
- Savings Products
- Product Restrictions**
- Funds
- Charges
- Accounting Rules
- Offices
- Employees
- Bulk Loan Reassignment
- Currency Configuration

+ Define Product Restrictions

Loan Product Name

Standard Loan

Personal Loan

Agricultural Loan

Car Loan

Home Loan

Festival Loan

Emergency Loan

Business Loan

Define Product Restrictions

Product:

Business Loan

Allowed Products

- Agricultural Loan
- Car Loan
- Emergency Loan
- Home Loan
- Festival Loan
- Standard Loan

Disallow >>

Disallowed Products

- Business Loan (a second one)
- Personal Loan

<< Allow

Save

Cancel



Organization

Search Organization

- Loan Products
- Savings Products
- Funds**
- Charges
- Accounting Rules
- Offices
- Employees
- Bulk Loan Reassignment
- Currency Configuration

New Fund

Fund Name	External ID
Standard Fund	2535663
Emergency Fund	15239332



Organization

Search Organization

Loan Products

Savings Products

Funds

Charges

Accounting Rules

Office

Employees

+ New Fund

Fund Name	External ID
Standard Fund	2535663
Emergency Fund	15239332

New Fund

Fund Name

name

External ID:

ID

Save

Cancel



Organization

Search Organization

- Loan Products
- Savings Products
- Funds**
- Charges
- Accounting Rules
- Office
- Employees

+ New Fund

Fund Name	External ID
Standard Fund	2535663
Emergency Fund	15239332

Edit Fund

Fund Name:

External ID:

Organization

Search Organization


[Loan Products](#)
[Savings Products](#)
[Funds](#)
[Charges](#)
[Accounting Rules](#)
[Offices](#)
[Employees](#)
[Bulk Loan Reassignment](#)
[Currency Configuration](#)
[+ New Charge](#)

Charge Name	Currency	Applies To	Amount	Type	When Applied	Penalty	Active
Application Fee	Indian Rupee	Loan	3	% Amount	Disbursement	No	Yes
Disbursement Fee	Indian Rupee	Loan	1	% Amount	Specified Due Date	No	Yes
Late Fee	Indian Rupee	Loan	100	Flat	Specified Due Date	Yes	Yes
Processing Fee	Indian Rupee	Loan	100	Flat	Specified Due Date	No	Yes
Opening Fee	Indian Rupee	Savings	100	Flat	Specified Due Date	No	Yes



Organization

Search Organization

Loan Products

Savings Products

Funds

Charges

Accounting Rules

Office

Employees

+ New Charge

New Charge



Charge Name

Application Fee

Disbursement Fee

Late Fee

Processing Fee

Opening Fee

Charge Name:

Currency:

1 Default to specified currency (if possible)

Charge applies to:

2 Default to loan?

Charge time: Specified Due Date
 Disbursement

Charge calculation: Flat
 % of Amount

Amount

Penalty No
 Yes

Activate Now

Save

Cancel

Active

Yes

Yes

Yes

Yes

Yes



Organization

Search Organization

- Loan Products
- Savings Products
- Funds
- Charges
- Accounting Rules**
- Offices
- Employees
- Bulk Loan Reassignment
- Currency Configuration

+ New Accounting Rule

Accounting Rule Name	Office	Debit Account	Debit Tags	Credit Account	Credit Tags
Rule 1	Head Office	Cash (001)		Loan Portfolio (002)	
Rule 2	Mangalore	Income from fees (003)		Income from penalties (004)	
Rule 3	Head Office	Cash (001)		Cash (001)	



Organization

Search Organization

New Accounting Rule

Accounting Rule Name:

Office:

Description:

See [alternative](#) for selecting tags

Debit Account Details

Debit Rule Type: Fixed

List (select debit tags)

- tag 1
- tag 2
- tag 3
- tag 4
- tag 5
- tag 6
- tag 7

Credit Account Details

Credit Rule Type: Fixed

List (select credit tags)

- tag 1
- tag 2
- tag 3
- tag 4
- tag 5
- tag 6
- tag 7

3 credit tags selected: tag 3, tag 6, tag 9

Save Cancel



Organization

Search Organization

New Accounting Rule

Accounting Rule Name:

Office:

Description:

See [alternative](#) for selecting tags

Debit Account Details

Debit Rule Type: Fixed

List (select debit tags) [Edit Tags](#)

Credit Account Details

Credit Rule Type: Fixed

List (select credit tags) [Edit Tags](#)

Save

Cancel



Organization

Search Organization

New Accounting Rule

Accounting Rule Name:

Office:

Description:

Debit Account Details

Debit Rule Type: Fixed List

Select Credit Tags

Available Tags

- Tag 1
- Tag 2
- Tag 4
- Tag 5
- Tag 7
- Tag 8
- Tag 10

Add >>

Selected Tags

- Tag 3
- Tag 6
- Tag 9

<< Remove

Save

Cancel

Save

Cancel



Organization

Search Organization

Loan
ProductsSavings
Products

Funds

Charges

Accounting
Rules**Offices**

Employees

Bulk Loan
ReassignmentCurrency
Configuration

New Office

Office Name	Opened On	External ID	Parent Office
Head Office	01 Jan 2009	1	
▼ Mangalore	01 Jan 2009	2	Head Office
Mangalore 2	10 Oct 2009	3	Managlore
▶ Mysore	14 Feb 2010	4	Head Office



Organization

Search Organization

- Loan Products
- Savings Products
- Funds
- Charges
- Accounting Rules
- Offices
- Employees
- Currency Configuration
- Bulk Loan Reassignment

+ New Office

Office Name	Opened On	External ID	Parent Office
Head Office	01 Jan 2009	1	
▼ Mangalore			
Mangalore 2			
► Mysore			

New Office

Office Name:

Parent Office: ▼ *Should probably default to head office*

Opened on:

External ID: *Should default to next consecutive number*



Organization

Search Organization

- Loan Products
- Savings Products
- Funds
- Charges
- Accounting Rules
- Offices
- Employees**
- Bulk Loan Reassignment
- Currency Configuration

- + New Employee
- Loan Reassignment

Search Employees

Employee	Office	Loan Officer
Bhandari, Aditya	Mangalore	Yes
Kumar, Rajesh	Head Office	Yes
Raju, Venkatesh	Head Office	Yes
Rayadu, Sanjay	Mangalore	Yes



Organization

Search Organization

- Loan Products
- Savings Products
- Funds
- Charges
- Accounting Rules
- Offices
- Employees**
- Currency Configuration
- Bulk Loan Reassignment

- + New Employee
- Loan Reassignment

Search Employees

Employee	Office	Loan Officer
Bhandari, Aditya	Head Office	Yes
Kumar, Rajesh		
Raju, Venkatesh		
Rayadu, Sanjay		

New Employee

Parent Office:

First Name:

Last Name:

Loan Officer: No Yes

Save

Cancel



Organization

Search Organization

- Loan Products
- Savings Products
- Funds
- Charges
- Accounting Rules
- Offices
- Employees**
- Currency Configuration
- Bulk Loan Reassignment

- + New Employee
- Loan Reassignment

- Employee**
- Bhandari, Aditya
 - Kumar, Rajesh
 - Raju, Venkatesh
 - Rayadu, Sanjay

Loan Reassignment

Office:

Assignment Date:

From Loan Officer:

To Loan Officer:

See [alternative](#) if groups are defined

<input type="checkbox"/> Clients (79)	Accounts
<input type="checkbox"/> Betty White	<input type="checkbox"/> Standard Loan: #1000002013 <input type="checkbox"/> Agricultural Loan: #1000021356
<input type="checkbox"/> Sarah Thompson	<input type="checkbox"/> Standard Loan: #1002012913 <input type="checkbox"/> Agricultural Loan: #12013293 <input type="checkbox"/> Emergency Loan: #1003222010 <input type="checkbox"/> Personal Loan: #1003212947

Save Cancel



Organization

Search Organization

- Loan Products
- Savings Products
- Funds
- Charges
- Accounting Rules
- Offices
- Employees**
- Currency Configuration
- Bulk Loan Reassignment

- + New Employee
- Loan Reassignment

Employee
Bhandari, Aditya
Kumar, Rajesh
Raju, Venkatesh
Rayadu, Sanjay

Loan Reassignment

Office:

Assignment Date:

From Loan Officer:

To Loan Officer:

If Groups are defined, a drop-down list appears to choose one (default all)

Groups then also appear in table to select

<input type="checkbox"/> Groups/Clients	<input type="checkbox"/> Meetings/Accounts
<input type="checkbox"/> The Red Hat Ladies	<input type="checkbox"/> Banda Temple Mondays 8-9am
<input type="checkbox"/> Betty White	<input type="checkbox"/> Standard Loan: #1000002013 <input type="checkbox"/> Agricultural Loan: #1000021356
<input type="checkbox"/> Sarah Thompson	<input type="checkbox"/> Standard Loan: #1002012913 <input type="checkbox"/> Agricultural Loan: #12013293 <input type="checkbox"/> Emergency Loan: #1003222010

Save Cancel



Organization

Search Organization 🔍

- Loan Products
- Savings Products
- Funds
- Charges
- Accounting Rules
- Offices
- Employees
- Bulk Loan Reassignment**
- Currency Configuration

This does exactly the same thing as selecting loan reassignment for an employee. Other than ease of finding this, perhaps we can remove this tab?



Organization

Search Organization

- Loan Products
- Savings Products
- Funds
- Charges
- Accounting Rules
- Offices
- Employees
- Bulk Loan Reassignment
- Currency Configuration

- Available Currencies**
- Afghanistan Afghani (AFN)
 - Albanian Lek (ALL)
 - Algerian Dinar (DZD)
 - Angolan Kwanza (AOA)
 - Argentine Peso (\$)
 - Armenian Dram (AMD)
 - Aruban Guilder (AWG)
 - Austrailian Dollar (A\$)

>>
<<

- Allowed Currencies**
- Indian Rupee (INR)
 - Kenyan Shilling (KSh)
 - Us Dollar (\$)



Organization

- Loan Products
- Savings Products
- Funds
- Charges
- Accounting Rules
- Offices
- Employees
- Currency Configuration
- Groups

[+ New Group](#)
[+ New Center](#)

Toying with the idea of merging groups and centers into a single table under "Groups" tab in admin. What do you think? Is this too hidden? I will add more details to this design.

Search Groups

Group	#	Center	Loan Officer	Meeting Time	Location	Activation Date	Office
Group 1	10	Center 1	Lorenz Guzman	Tues 9-10 am	St. Joseph's School	5 May 2012	Head Office
Group 2	10	Center 1	Lorenz Guzman	Tues 10-11 am	St. Joseph's School	21 Apr 2011	Head Office
Group 3	8	Center 1	Lorenz Guzman	Tues 11-12 am	St. Joseph's School	21 Apr 2011	Head Office
Group 4	11	Center 2	Harish Kumar	Wed 8-9 am	Cubbon Road	23 Oct 2009	Mangalore
Group 5	8	Center 2	Harish Kumar	Wed 10-11 am	Cubbon Road	12 Feb 2010	Mangalore
Group 6	7	Center 2	Harish Kumar	Wed 11-12 pm	Cubbon Road	18 Mar 2011	Mangalore
Group 7	8		Harish Kumar	Thurs 8-9 am	Ganesh Temple	12 Feb 2010	Mangalore
Group 8	6		Harish Kumar	Thurs 9-10 am	Hanuman Temple	16 Jun 2011	Mangalore
Group 9	10	Center 3	Larry Lender	Wed 10-11 am	Adi Shakthi Temple	5 Aug 2012	Head Office
Group 10	10	Center 3	Larry Lender	Wed 11-12 am	Adi Shakthi Temple	5 Aug 2012	Head Office
Group 11	9	Center 4	Larry Lender	Thurs 8-9 am	Ganesh Temple	8 Jan 2013	Head Office
Group 12	8	Center 4	Larry Lender	Thurs 9-10 am	Ganesh Temple	12 Feb 2010	Head Office
Group 12	8	Center 4	Larry Lender	Thurs 9-10 am	Ganesh Temple	12 Feb 2010	Head Office
Group 12	8	Center 4	Larry Lender	Thurs 9-10 am	Ganesh Temple	12 Feb 2010	Head Office
Group 12	8	Center 4	Larry Lender	Thurs 9-10 am	Ganesh Temple	12 Feb 2010	Head Office
Group 12	8	Center 4	Larry Lender	Thurs 9-10 am	Ganesh Temple	12 Feb 2010	Head Office



Manage Groups

Head Office > Mangalore

Groups

Centers

Communal Banks

Group	#	Center	Loan Officer	Meeting Time	Location	Activation Date	Office
Group 1	10	Center 1	Lorenz Guzman	Tues 9-10 am	St. Joseph's School	5 May 2012	Head Office
Group 2	10	Center 1	Lorenz Guzman	Tues 10-11 am	St. Joseph's School	21 Apr 2011	Head Office
Group 3	8	Center 1	Lorenz Guzman	Tues 11-12 am	St. Joseph's School	21 Apr 2011	Head Office
Group 4	11	Center 2	Harish Kumar	Wed 8-9 am	Cubbon Road	23 Oct 2009	Mangalore
Group 5	8	Center 2	Harish Kumar	Wed 10-11 am	Cubbon Road	12 Feb 2010	Mangalore
Group 6	7	Center 2	Harish Kumar	Wed 11-12 pm	Cubbon Road	18 Mar 2011	Mangalore
Group 7	8		Harish Kumar	Thurs 8-9 am	Ganesh Temple	12 Feb 2010	Mangalore
Group 8	6		Harish Kumar	Thurs 9-10 am	Hanuman Temple	16 Jun 2011	Mangalore
Group 9	10	Center 3	Larry Lender	Wed 10-11 am	Adi Shakthi Temple	5 Aug 2012	Head Office
Group 10	10	Center 3	Larry Lender	Wed 11-12 am	Adi Shakthi Temple	5 Aug 2012	Head Office
Group 11	9	Center 4	Larry Lender	Thurs 8-9 am	Ganesh Temple	8 Jan 2013	Head Office
Group 12	8	Center 4	Larry Lender	Thurs 9-10 am	Ganesh Temple	12 Feb 2010	Head Office
Group 12	8	Center 4	Larry Lender	Thurs 9-10 am	Ganesh Temple	12 Feb 2010	Head Office
Group 12	8	Center 4	Larry Lender	Thurs 9-10 am	Ganesh Temple	12 Feb 2010	Head Office
Group 12	8	Center 4	Larry Lender	Thurs 9-10 am	Ganesh Temple	12 Feb 2010	Head Office
Group 12	8	Center 4	Larry Lender	Thurs 9-10 am	Ganesh Temple	12 Feb 2010	Head Office

Showing 1-20 of 350 Objects

[Prev](#)
[1](#)
[2](#)
[3](#)
[4](#)
[5](#)
[6](#)
[...](#)
[17](#)
[18](#)
[Next](#)



Manage Groups

Head Office > Mangalore

My Common Tasks


[My Dashboard](#)

- [Enter Collection Sheet Data](#)
- [Create New Center](#)
- [Create New Group](#)
- [Create New Client](#)
- [Create Savings Account](#)
- [Create Loan Account](#)
- [Create Multiple Loan Accounts](#)

Groups

Centers

Communal Banks

New Group

Search Groups

Group	#	Center	Loan Officer	Meeting Time	Location	Activation Date	Office
Group 1	10	Center 1	Lorenz Guzman	Tues 9-10 am	St. Joseph's Sc...	5 May 2012	Head Office
Group 2	10	Center 1	Lorenz Guzman	Tues 10-11 am	St. Joseph's Sc...	21 Apr 2011	Head Office
Group 3	8	Center 1	Lorenz Guzman	Tues 11-12 am	St. Joseph's Sc...	21 Apr 2011	Head Office
Group 4	11	Center 2	Harish Kumar	Wed 8-9 am	Cubbon Road	23 Oct 2009	Mangalore
Group 5	8	Center 2	Harish Kumar	Wed 10-11 am	Cubbon Road	12 Feb 2010	Mangalore
Group 6	7	Center 2	Harish Kumar	Wed 11-12 pm	Cubbon Road	18 Mar 2011	Mangalore
Group 7	8		Harish Kumar	Thurs 8-9 am	Ganesh Temple	12 Feb 2010	Mangalore
Group 8	6		Harish Kumar	Thurs 9-10 am	Hanuman Tem...	16 Jun 2011	Mangalore
Group 9	10	Center 3	Larry Lender	Wed 10-11 am	Adi Shakthi Te...	5 Aug 2012	Head Office
Group 10	10	Center 3	Larry Lender	Wed 11-12 am	Adi Shakthi Te...	5 Aug 2012	Head Office
Group 11	9	Center 4	Larry Lender	Thurs 8-9 am	Ganesh Temple	8 Jan 2013	Head Office
Group 12	8	Center 4	Larry Lender	Thurs 9-10 am	Ganesh Temple	12 Feb 2010	Head Office
Group 12	8	Center 4	Larry Lender	Thurs 9-10 am	Ganesh Temple	12 Feb 2010	Head Office
Group 12	8	Center 4	Larry Lender	Thurs 9-10 am	Ganesh Temple	12 Feb 2010	Head Office
Group 12	8	Center 4	Larry Lender	Thurs 9-10 am	Ganesh Temple	12 Feb 2010	Head Office
Group 12	8	Center 4	Larry Lender	Thurs 9-10 am	Ganesh Temple	12 Feb 2010	Head Office

Showing 1-20 of 350 Objects

[Prev](#)
[1](#)
[2](#)
[3](#)
[4](#)
[5](#)
[6](#)
[...](#)
[17](#)
[18](#)
[Next](#)



Manage Groups

Head Office > Mangalore

My Common Tasks

- Enter Collection Sheet Data
- Create New Center
- Create New Group
- Create New Client
- Create Savings Account
- Create Loan Account
- Create Multiple Loan Accounts

Groups Centers Communal Banks

New Group

Office:

Staff:

Name:

ID:

Meeting:

Activate on

Clients:

Group Name	Creation Date	Office
Group 1	2012	Head Office
Group 2	2011	Head Office
Group 3	2011	Head Office
Group 4	2009	Mangalore
Group 5	2010	Mangalore
Group 6	2011	Mangalore
Group 7	2010	Mangalore
Group 8	2011	Mangalore
Group 9	2012	Head Office
Group 10	2012	Head Office
Group 11	2013	Head Office
Group 12	2010	Head Office
Group 13	2010	Head Office
Group 14	2010	Head Office
Group 15	2010	Head Office
Group 16	2010	Head Office
Group 17	2010	Head Office
Group 18	2010	Head Office

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

My Common Tasks

My Dashboard

- [Enter Collection Sheet Data](#)
- [Create New Center](#)
- [Create New Group](#)
- [Create New Client](#)
- [Create Savings Account](#)
- [Create Loan Account](#)
- [Create Multiple Loan Accounts](#)

Groups

+ New Group



You have successfully created a new group.
Click group in table to view details and add clients.

- Suggested next steps:
- [Add Clients to this group](#)
 - [Create Group Loan](#)

Clicking the links will navigate (Create Group Loan works) clicking anywhere else will make the notification go away

Group		Location	Activation Date	Office			
Group 1	10	Center 1	Lorenz Guzman	Tues 9-10 am	St. Joseph's Sc...	5 May 2012	Head Office
Group 2	10	Center 1	Lorenz Guzman	Tues 10-11 am	St. Joseph's Sc...	21 Apr 2011	Head Office
Group 3	8	Center 1	Lorenz Guzman	Tues 11-12 am	St. Joseph's Sc...	21 Apr 2011	Head Office
Group 4	11	Center 2	Harish Kumar	Wed 8-9 am	Cubbon Road	23 Oct 2009	Mangalore
Group 5	8	Center 2	Harish Kumar	Wed 10-11 am	Cubbon Road	12 Feb 2010	Mangalore
Group 6	7	Center 2	Harish Kumar	Wed 11-12 pm	Cubbon Road	18 Mar 2011	Mangalore
Group 7	8		Harish Kumar	Thurs 8-9 am	Ganesh Temple	12 Feb 2010	Mangalore
Group 8	6		Harish Kumar	Thurs 9-10 am	Hanuman Tem...	16 Jun 2011	Mangalore
Group 9	10	Center 3	Larry Lender	Wed 10-11 am	Adi Shakthi Te...	5 Aug 2012	Head Office
Group 10	10	Center 3	Larry Lender	Wed 11-12 am	Adi Shakthi Te...	5 Aug 2012	Head Office
Group 11	9	Center 4	Larry Lender	Thurs 8-9 am	Ganesh Temple	8 Jan 2013	Head Office
Group 12	8	Center 4	Larry Lender	Thurs 9-10 am	Ganesh Temple	12 Feb 2010	Head Office
Group 12	8	Center 4	Larry Lender	Thurs 9-10 am	Ganesh Temple	12 Feb 2010	Head Office
Group 12	8	Center 4	Larry Lender	Thurs 9-10 am	Ganesh Temple	12 Feb 2010	Head Office
Group 12	8	Center 4	Larry Lender	Thurs 9-10 am	Ganesh Temple	12 Feb 2010	Head Office
Group 12	8	Center 4	Larry Lender	Thurs 9-10 am	Ganesh Temple	12 Feb 2010	Head Office

Showing 1-20 of 350 Objects

Prev 1 2 3 4 5 6 ... 17 18 Next

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	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:

Attach Meeting...

Activate on ___ / ___ / ____

Clients:

Flores	Ana	100000003	Active
Frankln	Ben	100000032	Pending
Yee	Francine	100000016	Active

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

Staff: -- Select Loan Officer --

Name: Group 1

ID: 001000321

Meeting: Attach Meeting...

Activate on ___ / ___ / ____

Clients:

Flores	Ana	10000003	Active	Browse... Remove
Franklin	Ben	10000032	Pending	
Yee	Francine	10000016	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..."/>
Yee	Francine	100000016	Active	



Group 1

Branch > Center 1 > Group 1

Summary

Documents

Edit Group

+ New Loan

+ New Savings

▲ 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



Summary	Count
Active Clients	10
Active Client Loans	6
Active Group Loans	1
Active Client Borrowers	10
Active Group Borrowers	8
Active Borrowers	10
Overdue Client Loans	1
Overdue Group Loans	0
Overdue Loans	1

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

Manage Groups

Head Office > Mangalore

Groups

Groups

Centers

Communal Banks

Group 1

Edit Group

Summary

Documents

Actions

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



Summary

Count

Active Clients	10
Active Client Loans	6
Active Group Loans	1
Active Client Borrowers	10
Active Group Borrowers	8
Active Borrowers	10
Overdue Client Loans	1
Overdue Group Loans	0
Overdue Loans	1

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
Ana Flores #0012010105	-1,000	Active
Ana Flores #0012010105	-1,000	Active
Ana Flores #0012010105	-1,000	Active
Ana Flores #0012010105	-1,000	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

▲ Back to Manage Groups

Name: **Group 1**
 Status: Active
 Activation Date:
 Office:
 Loan Cycles: 4
 Meeting Time: E

PPI - 2.45

Summary

Count

10
6
1
10
8
10
1
0
1

Create Multiple Loans

Office: Head Office

Center: Center 1

Staff: Larry Lender

Loan: -- select one --

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

Done

Cancel

Clients

Anil Ambani

Betty White

Sindhu Srinivas

Cherry San Pietro

Ana Flores

Loan Accounts

Standard Group Lo

Group Livestock Lo



Manage Groups

Head Office > Mangalore

My Common Tasks

[My Dashboard](#)

[Enter Collection Sheet Data](#)

[Create New Center](#)

[Create New Group](#)

[Create New Client](#)

[Create Savings Account](#)

[Create Loan Account](#)

[Create Multiple Loan Accounts](#)

Groups
Centers
Communal Banks
Group 1

Edit Group
Summary
Documents
Actions

Name: **Group 1**

Status: Active

Activation Date: 02 April 2009

Office: Bangalore

Loan Cycles: 4

Meeting Time: Every Tuesday, 9-10 am

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	
Ana Flores	#0012010105	-1,000	Active	
Ana Flores	#0012010105	-1,000	Active	
Ana Flores	#0012010105	-1,000	Active	
Ana Flores	#0012010105	-1,000	Active	
Ana Flores	#0012010105	-1,000	Active	

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

You have successfully created multiple loans.
Click the individual clients to see their new loans.

New loan accounts with the following IDs have been created:

- [#0010001611](#)
- [#0010001612](#)
- [#0010001613](#)
- [#0010001614](#)
- [#0010001615](#)

Active Group Loans	1
Active Client Borrowers	10
Active Group Borrowers	8
Active Borrowers	10
Overdue Client Loans	1
Overdue Group Loans	0
Overdue Loans	1



Manage Groups

Head Office > Mangalore

Groups

My Common Tasks

My Dashboard

- [Enter Collection Sheet Data](#)
- [Create New Center](#)
- [Create New Group](#)
- [Create New Client](#)
- [Create Savings Account](#)
- [Create Loan Account](#)
- [Create Multiple Loan Accounts](#)

Groups
Centers
Communal Banks
Group 1 ✕

Edit Group
Summary
Documents
 Actions ▼

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

Summary	Count
Active Clients	10
Active Client Loans	6
Active Group Loans	1
Active Client Borrowers	10
Active Group Borrowers	8
Active Borrowers	10
Overdue Client Loans	1
Overdue Group Loans	0
Overdue Loans	1

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
Ana Flores #0012010105	-1,000	Active
Ana Flores #0012010105	-1,000	Active
Ana Flores #0012010105	-1,000	Active
Ana Flores #0012010105	-1,000	Active
Ana Flores #0012010105	-1,000	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: Head Office

Staff: -- Select Loan Officer --

Name: Group 1

ID: 001000321

Meeting: Every Tuesday, 9-10 am

Update Meeting...

Activated on: 12 / 13 / 1211

Clients:

Ambani	Anil	10000003	Active
Flores	Ana	100000032	Active
San Pietro	Cherry	100000016	Active
Srinivas	Sindhu	100000016	Active
White	Betty	100000016	Active

Browse...

Remove

Done

Cancel

Recent Notes

5/5/2013 - missed meeting due to funeral

Manage Groups

Head Office > Mangalore

Groups

Centers

Communal Banks

+ New Center

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](#)

My Common Tasks <<

[My Dashboard](#)
[Enter Collection Sheet Data](#)
[Create New Center](#)
[Create New Group](#)
[Create New Client](#)
[Create Savings Account](#)
[Create Loan Account](#)
[Create Multiple Loan Accounts](#)
[Groups](#)
[Centers](#)
[Communal Banks](#)
[+ New Center](#)

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

My Common Tasks

- Enter Collection Sheet Data
- Create New Center
- Create New Group
- Create New Client
- Create Savings Account
- Create Loan Account
- Create Multiple Loan Accounts

Groups

Centers

Communal Banks

+ New Center

New Center

Office:

Staff:

Name:

ID:

Location:

Meetings:

Set Meeting Time

Activate on

Done

Cancel

Search Centers

Center Name	Location	# of Groups
Center 1	Joseph's School	3
Center 2	bon Road	2
Center 3	esh Temple	3
Center 4	uman Temple	3
Center 5	Road	5

Manage Groups

Head Office > Mangalore

My Common Tasks

<<

[My Dashboard](#)[Enter Collection Sheet Data](#)[Create New Center](#)[Create New Group](#)[Create New Client](#)[Create Savings Account](#)[Create Loan Account](#)[Create Multiple Loan Accounts](#)

Groups

Centers

[+ New Center](#)**You have successfully created a new center.**

Click center in table to view details and create groups.

Suggested next steps:

[Create Loan Account](#)[Create Savings Account](#)

Clicking the links will navigate (neither currently work) clicking anywhere else will make the notification go away

Search Centers

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:

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