Branch Manager: Maria Manager

Loans Pending Approval

34

Approve Loans

To-Do List

May 16, 2013

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

Delinquency

2.97%

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

Collections For:

May 16, 2013

82% complete

View Collections

Portfolio

2,130,000

Target 2013

New Loan

New Clients

May 2013

15 more

New Client

Mifos – Individual Lending

Mifos – Individual Lending

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Google

Mifos

Clients Loans Administration Accounting Reports

All Coll

Culture default Sign out

Actions

Enter **Coll**ection Sheet Data

View **Coll**ections

Clients

Collette Morrissey

Loan Products

College Tuition

Branch Manager: Maria Manager

Loans Pending Approval

34

Approve Loans

To-Do List

May 1

Approve Loans 34

End of Month Closing

Active Loans Summary

MFI Performance

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Collections For:

May 16, 2013

82% complete

View Collections

Portfolio

2,130,000

Target 2013

New Loan

New Clients

May 2013

15 more

New Client

Alternative Search Menu

Action: Enter Collection Sheet Data

Action: View Collections

Client: Collette Morrissey

Loan Product: College Tuition

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Mifos – Individual Lending

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Mifos

Clients Loans Administration Accounting Reports

All Search

Culture default Sign out

All
Clients
Loans
Reports
Action

Branch Manager: Maria Manager

Loans Pending Approval

34

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New Client

Mifos – Individual Lending

Mifos – Individual Lending

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Google

Mifos

Clients Loans Administration Accounting Reports

Search

Culture mifos Sign out

Users

Organisation

System

Branch Manager: Maria

Loans Pending Approval

34

Approve Loans

To-Do List

May 16, 2013

Approve Loans 34

End of Month Closing

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May 2013

15 more

New Client

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Mifos – Individual Lending

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Account Settings

Branch Manager: Maria Manager

Loans Pending Approval

34

Approve Loans

To-Do List

May 16, 2013

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

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Collections For:

May 16, 2013

82% complete

View Collections

Portfolio

2,130,000

Target 2013

New Loan

New Clients

May 2013

15 more

New Client

New Loan

New Savings

Edit Client

Claire Client

Active

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

Loan Performance

Loans

Standard Client Loan	#0010002013562	-11,356.2	Active in Bad Standing
Car Loan	#0010002027323	-8,245.0	Application Approved

Savings

Individual Savings	#0020003024128	14,238.9	Active
Mandatory Savings	#0020003016348	432.0	Active

Other

Client Charges		0	

Percent of loan saved: **75%**

PPI

Recent Notes

5/5/2013 - missed meetingdue to funeral

New Loan

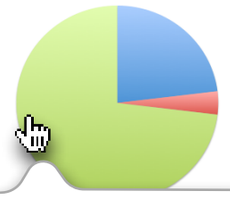
New Savings

Edit Client

Claire Client

Active

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



Loans

Standard Client Loan	#0010002013562	-11,356.2	Active in Bad Standing
Car Loan	#0010002027323	-8,245.0	Application Approved

Savings

Individual Savings	#0020003024128	14,238.9	Active
Mandatory Savings	#0020003016348	432.0	Active

Other

Client Charges		0	

Percent of loan saved: **75%**

Performance History

Loan Cycle	2
Amount of Last Loan	1,000
Active Loans	2
Delinquent Portfolio	0
Total Savings	14,668.9
Meetings Attended	35
Meetings Missed	3
Loan Cycle Per Product	3
Individual Medical Loan	1
Standard Client Loan	2

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: May 16, 2013 Loan Officer: Kim Huch Sieng

	Due/Collections							Issues/Withdrawals								
Borrower	ADM	ADM3	LTL	dbir	MS1	SA	DCF	ADM	ADM3	LTL	dbir	MS1	SA	DCF	A/C Coll	Attendance
Group 100																
Komik Batmana						1000.0									0.0	Present
Tymteusz Otwarty	2513.5					0.0									2.0	Late
Mohamed Adil			115.0			0.0									23.0	Absent
Group Account(s)															0.0	
Group Total	2513.5	0.0	115.0	0.0	0.0	1000.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0,0	25.0	
Group ABC																
SHG Client		6954.0		170.1		0.0	500.0								0.0	Approved
Tet sw Tes asas		3477.0				0.0									0.0	Present
Client test211		5316.0			2000.0	0.0									0.0	Present
Group account(s)																
Group Total	0.0	15747.0	0.0	170.1	2000.0	0.0	500.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	

Total Collections

Due Collections: 67828.1

Other Collections: 25.0

Total: 67853.1

Total Issues/Withrawals

Loan Disbursements: 0.0

Withdrawals: 0.0

Total: 0.0

Net Cash: 67851.1

Okay Cancel

Create a Checklist

Name: Loan Approval Process

Type: Loan

Add a task to checklist

Mifos task

Manual task

Task 1: Create new loan

Mifos – Individual Lending

Mifos – Individual Lending

https://demo.openmf.org

Google

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

New Member Checklist - Miranda Vazquez

Task	Done By	Approved By
☑ Client created in Mifos	Larry Lender	Maria Manager
☐ Verify actively involved in income generating activity	Larry Lender	Maria Manager
☐ Establish Creditworthiness	Larry Lender	Maria Manager

Group:

Name: Loan Approval Process

Type: Loan

Add a task to checklist

Task 1:

◉ Mifos task
○ Manual task

Task 1: Create new loan

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Mifos – Individual Lending

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Google

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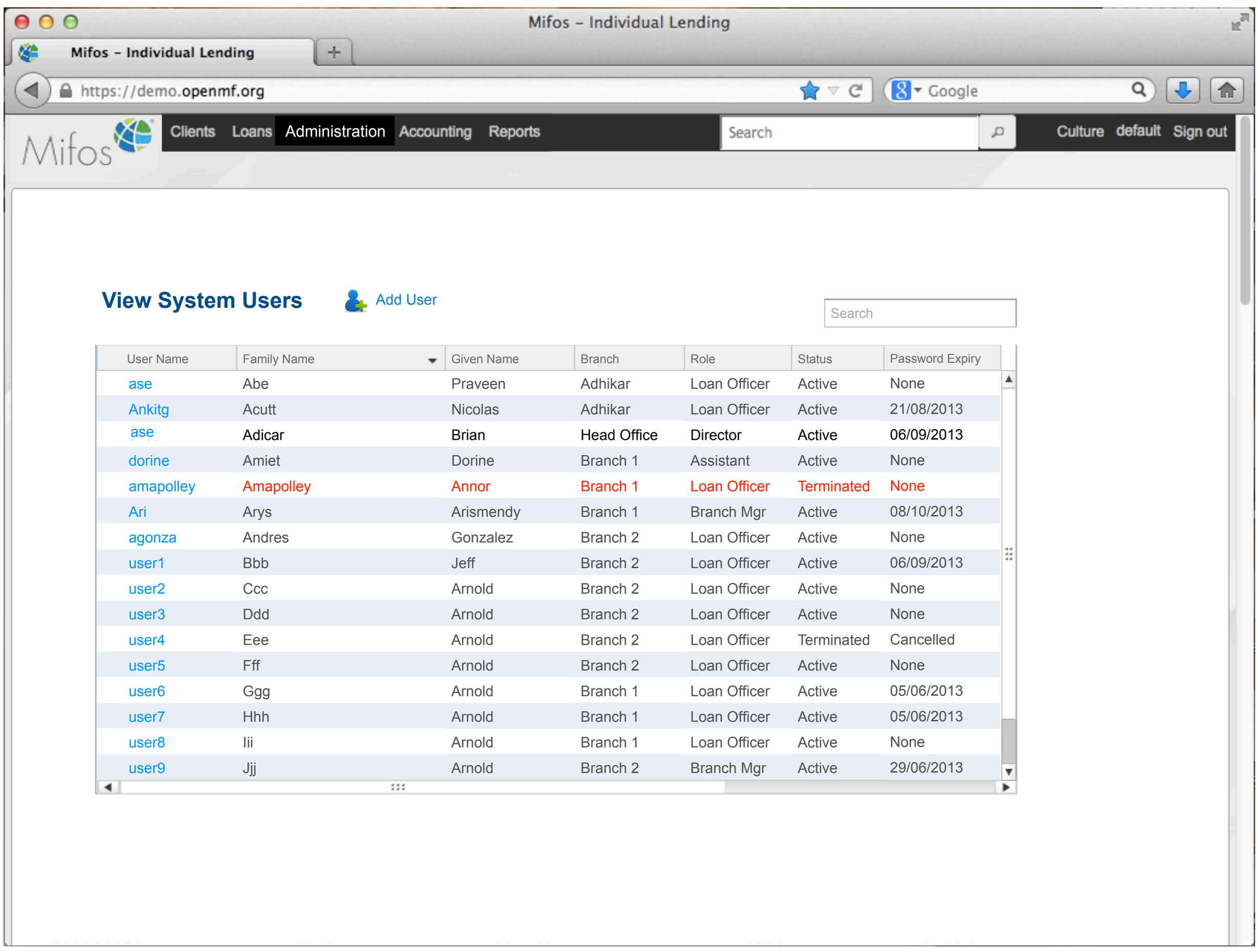
Administrative Tasks

Organization

- Users
- Permissions
- Manage Offices

Products



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

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Mifos - Individual Lending

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View System Us

User Name	Fan
ase	Ab
Ankitg	Acu
ase	Adi
dorine	Am
amapolley	Am
Ari	Ary
agonza	An
user1	Bb
user2	Cc
user3	Dd
user4	Ee
user5	Fff
user6	Gg
user7	Hh
user8	Iii
user9	Jjj

User Details

User Details

User Name	
Family Name	
Given Name	
Email	
Office	Head Office
Role(s)	☐ Branch Manager ☐ Coordinator of Agents ☐ Data Entry Administrator ☐ Director of the Program ☐ Field Officer ☐ Funder ☐ Group Leader ☑ Loan Officer ☐ Sales ☐ SE ☐ Super User

Save | Cancel

Mifos - Individual Lending

https://demo.openmf.org

Clients | Loans | Administration | Accounting | Reports | Search | Culture default | Sign out

View System Us

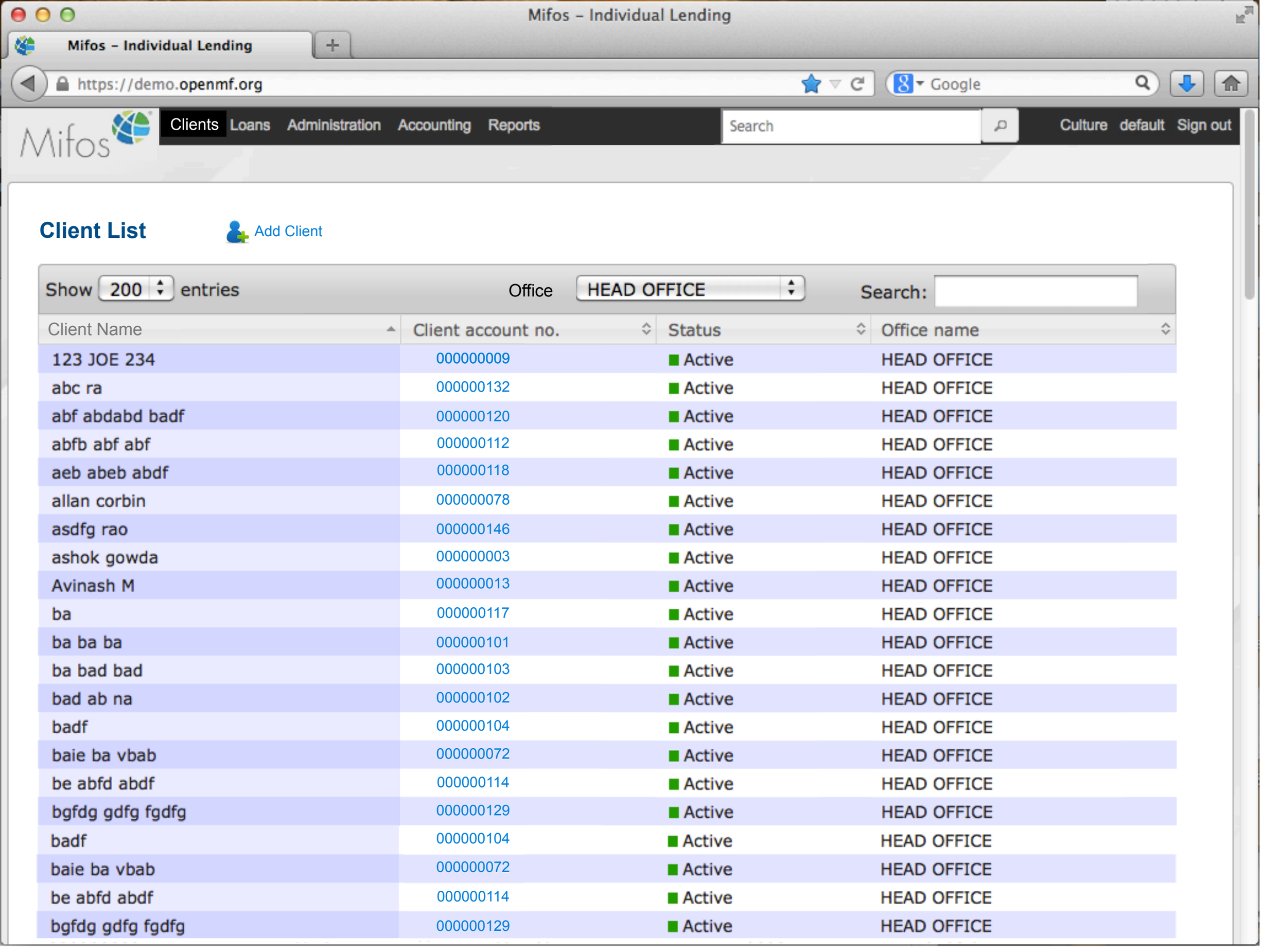
User Name	Fan
ase	Ab
Ankitg	Acu
ase	Adi
dorine	Am
amapolley	Am
Ari	Ary
agonza	An
user1	Bb
user2	Cc
user3	Dd
user4	Ee
user5	Fff
user6	Gg
user7	Hh
user8	Iii
user9	Jjj

User Details

User Details

User Name	dorine
Family Name	Amiet
Given Name	Dorine
Email	damiet@mfi.org
Office	Head Office
Role(s)	☐ Branch Manager ☐ Coordinator of Agents ☐ Data Entry Administrator ☐ Director of the Program ☐ Field Officer ☐ Funder ☐ Group Leader ☐ Loan Officer ☐ Sales ☐ SE ☑ Super User

Save | Cancel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Clients
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Search
Culture
default
Sign out
Client List
Add Client
Show 200 entries
Office HEAD OFFICE
Search:
Client Name
Client account no.
Status
Office name
123 JOE 234 000000009 Active HEAD OFFICE
abc ra 000000132 Active HEAD OFFICE
abf abdabd badf 000000120 Active HEAD OFFICE
abfb abf abf 000000112 Active HEAD OFFICE
aeb abeb abdf 000000118 Active HEAD OFFICE
allan corbin 000000078 Active HEAD OFFICE
asdfg rao 000000146 Active HEAD OFFICE
ashok gowda 000000003 Active HEAD OFFICE
Avinash M 000000013 Active HEAD OFFICE
ba 000000117 Active HEAD OFFICE
ba ba ba 000000101 Active HEAD OFFICE
ba bad bad 000000103 Active HEAD OFFICE
bad ab na 000000102 Active HEAD OFFICE
badf 000000104 Active HEAD OFFICE
baie ba vbab 000000072 Active HEAD OFFICE
be abfd abdf 000000114 Active HEAD OFFICE
bgfdg gdfg fgdfg 000000129 Active HEAD OFFICE
badf 000000104 Active HEAD OFFICE
baie ba vbab 000000072 Active HEAD OFFICE
be abfd abdf 000000114 Active HEAD OFFICE
bgfdg gdfg fgdfg 000000129 Active HEAD OFFICE

Loans

New Loan

Filter by: None

Search

Loan Number	Loan Status	Loan Product	Principal	Total Outstanding	Overdue
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	Pending Approval	Business Loan	500	3,219	0
100000012	Active	Business Loan	1000	3,210	0
100000013	Active	Home Loan	1000	34,211	0
100000014	Approved	Car Loan	500	3,400	0
100000015	Pending approval	Business Loan	400	2,000	0
100000016	Approved	Business Loan	500	2,000	0

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Mifos – Individual Lending

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Google

Mifos

Clients | Loans | Administration | Accounting | Reports

Search

Culture default Sign out

Loans

New Loan

Filter by: None

Search

- Pending Approval
- Active in Bad Standing
- Closed
- Withdrawn

Loan Number	Loan Status	Loan Product		Outstanding	Overdue
100000001	Active	Home Loan		10	0
100000002	Withdrawn by applicant	Home Loan		0	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	Pending Approval	Business Loan	500	3,219	0
100000012	Active	Business Loan	1000	3,210	0
100000013	Active	Home Loan	1000	34,211	0
100000014	Approved	Car Loan	500	3,400	0
100000015	Pending approval	Business Loan	400	2,000	0
100000016	Approved	Business Loan	500	2,000	0

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Mifos – Individual Lending

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Google

Mifos

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Search

Culture default Sign out

Loans

Approve Loans

Filter by: Pending Approval

Search

Loan Number	Loan Status	Loan Product	Principal	Total Outstanding	Date Submitted
100000011	Pending Approval	Business Loan	500	3,219	May 23, 2013
100000002	Pending Approval	Business Loan	400	2,000	May 23, 2013
100000213	Pending Approval	Home Loan	1000	32,210	May 28, 2013
100000054	Pending Approval	Car Loan	1500	5,213	May 28, 2013
100000321	Pending Approval	Car Loan	1500	3,259	May 28, 2013
100000006	Pending Approval	Emergency Loan	100	1000	May 28, 2013

Mifos – Individual Lending

Mifos – Individual Lending

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Google

Mifos

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Search

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Paranaque Branch / Center3 / Group3 / Client - Megana Martin

General | Identity Documents | Client Documents | dfgfd

100000523 - Car Loan

Pending Approval
Disbursal Date: 5/31/2013

Loan Performance

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

Approve Loan

View Schedule

Edit Client

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