

# **Home Page Dashboard with Navigation Options**



### 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?

1. Control to open task sidebar



### Loan Officer: Larry Lender

1. Control to close sidebar

#### My Common Tasks



1

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

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Target 2013

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#### Other Loan Officer Portlet?

2. Readjust portlets to fit horizontally on page

2



### Loan Officer: Larry Lender

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#### Other Loan C



1. Keep portlets layout, add horizontal scrolling



### Loan Officer: Larry Lender

My Tasks v

1

1. Add My Tasks button with down arrow

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### Loan Officer: Larry Lender

My Tasks ^

1

Task bar opens horizontally, pushes portlets down

Create New Center  
Create New Group  
Create New Client

Create Savings Account  
Create Loan Account  
Create Multiple Loan Accounts

Enter Collection Sheet Data

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1. Add a My Tasks menu to the menubar

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#### Other Loan Officer Portlet?



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

### Loan Officer: Larry Lender

1. User selects task from menu

1

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1

1. User can configure this display from here.

## 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

2. User can turn display controls on/off

### My Common Tasks

- Display My Common Tasks

2

#### Available Tasks

- Create Multiple Loans
- Create New Center
- Create New Client
- Create New Group
- Enter Collection Sheet Data
- View Loans in Bad Standing
- View Loans to be paid this week
- Other



#### My Tasks



3

3. User can select which tasks they want in the My Tasks menu/sidebar and arrange them to their liking