Home Page Dashboard with Navigation Options
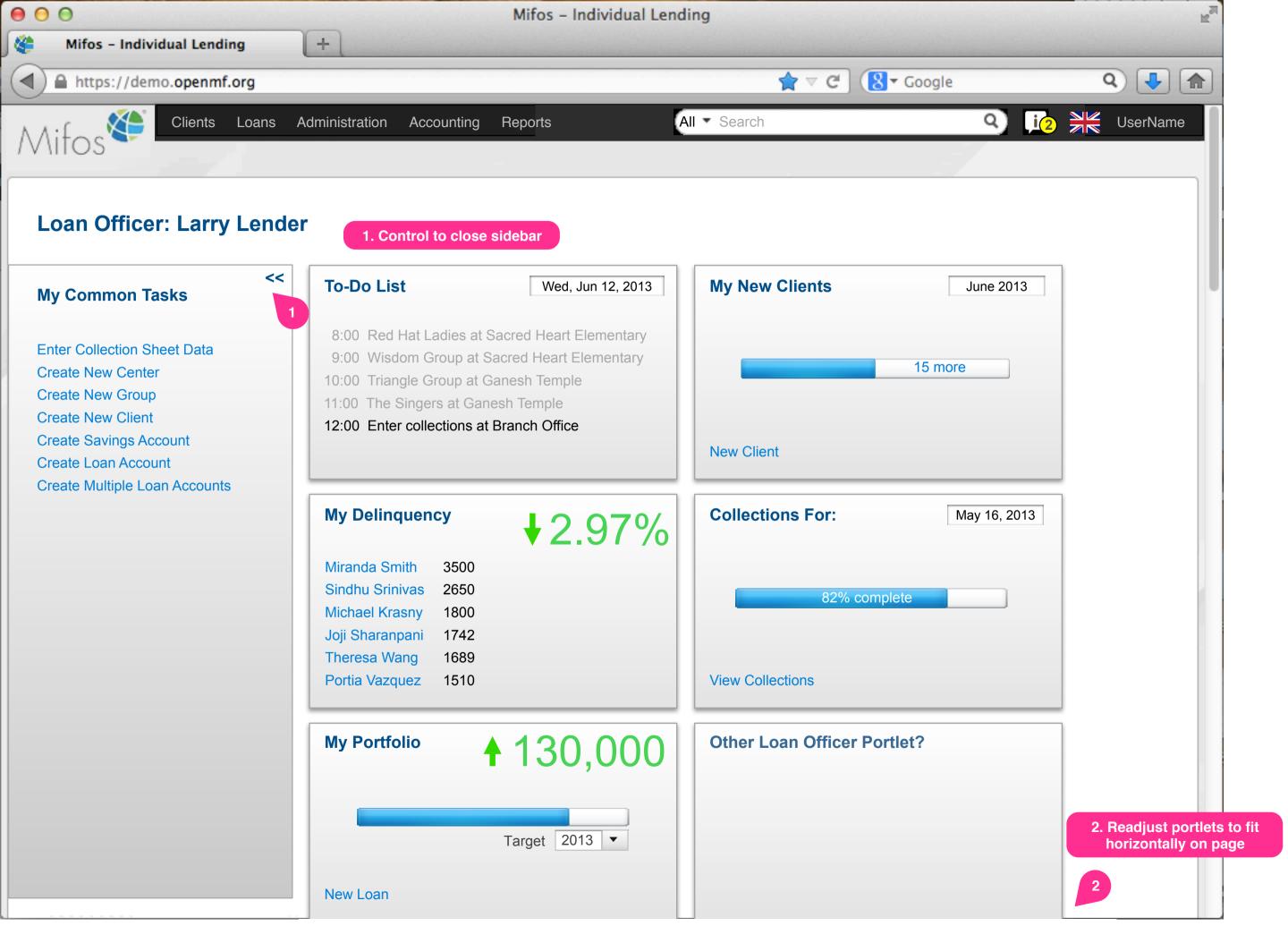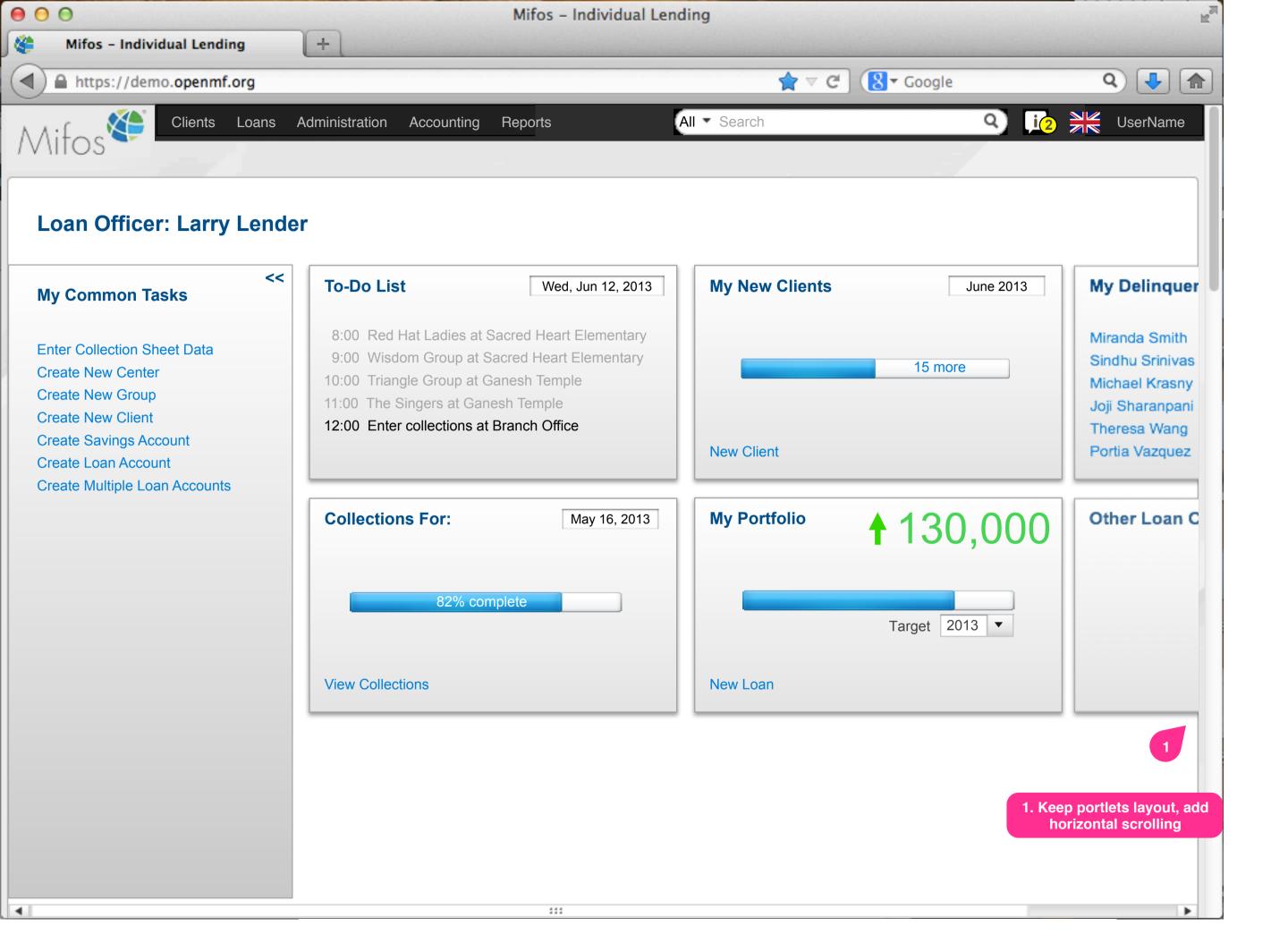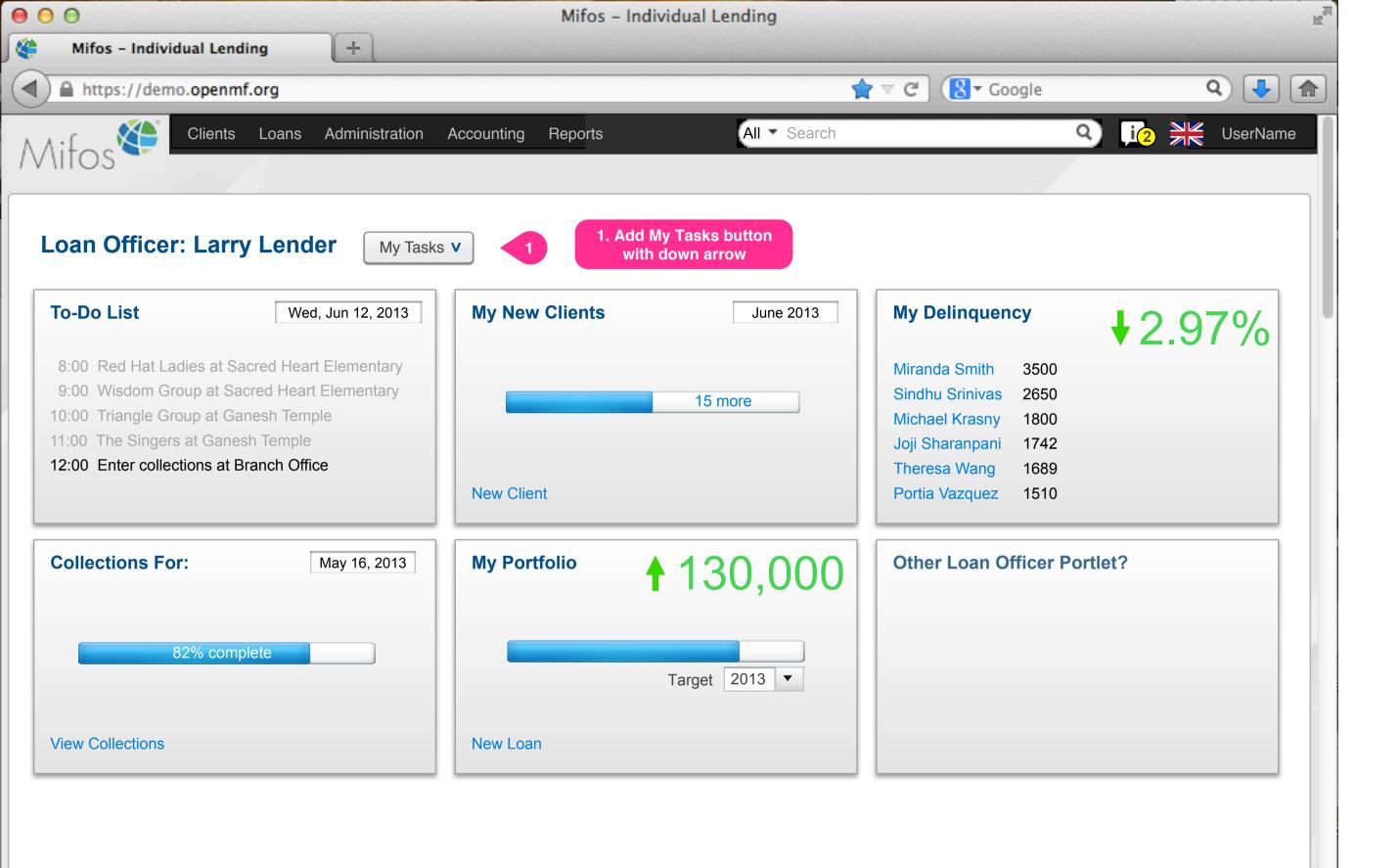
Deanna McCusker

User Experience Designer

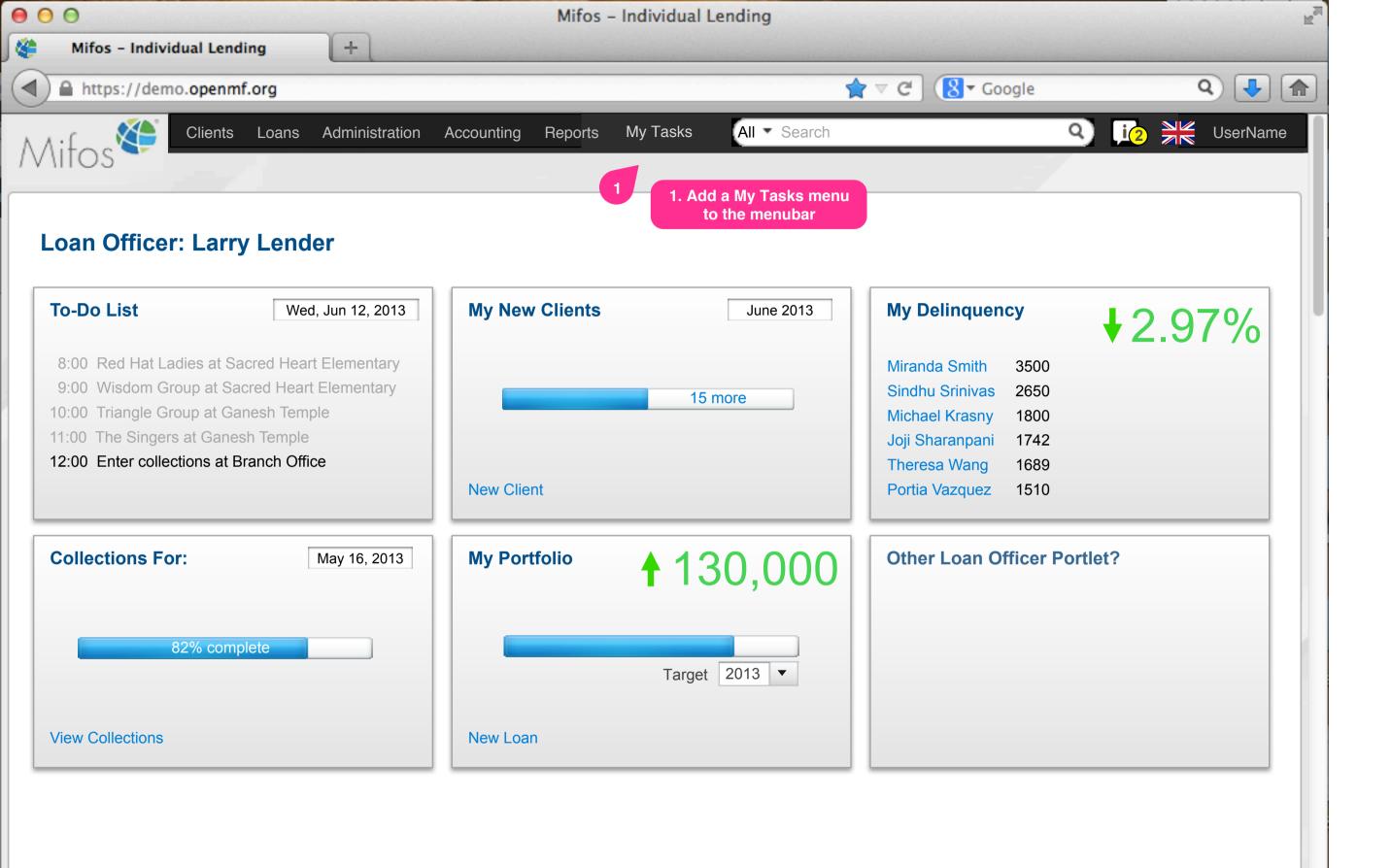June 13, 2013

Mifos – Individual Lending

Clients   Loans   Administration   Accounting   Reports

All ▾ | Search

UserName

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

15 more

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

82% complete

View Collections

My Portfolio
↑130,000

Target 2013 ▾

New Loan

Other Loan Officer Portlet?

1. Control to open task sidebar

Mifos – Individual Lending | +

https://demo.openmf.org

Google

Mifos

Clients   Loans   Administration   Accounting   Reports

All ▾   Search   🔍   💬 2   🇬🇧   UserName

Loan Officer: Larry Lender

1. Control to close sidebar

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

To-Do List   Wed, Jun 12, 2013

8:00   Red Hat Ladies at Sacred Heart Elementary
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Collections For: May 16, 2013

82% complete

View Collections

My Portfolio   ↑130,000

Target   2013 ▾

New Loan

Other Loan Officer Portlet?

2. Readjust portlets to fit horizontally on page

https://demo.openmf.org

Google

Clients   Loans   Administration   Accounting   Reports

All ▾ Search

i 2

UserName

Loan Officer: Larry Lender

My Common Tasks   <<

Enter Collection Sheet Data
Create New Center
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Create Multiple Loan Accounts

To-Do List   Wed, Jun 12, 2013

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My New Clients   June 2013

15 more

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Theresa Wang
Portia Vazquez

Collections For: May 16, 2013

82% complete

View Collections

My Portfolio   ↑ 130,000

Target 2013 ▾

New Loan

Other Loan C

1

1. Keep portlets layout, add horizontal scrolling

Mifos – Individual Lending

https://demo.openmf.org

Google

Clients   Loans   Administration   Accounting   Reports

All ▾ Search

UserName

Loan Officer: Larry Lender   My Tasks ∨   1

1. Add My Tasks button with down arrow

To-Do List   Wed, Jun 12, 2013

8:00   Red Hat Ladies at Sacred Heart Elementary
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Collections For: May 16, 2013

82% complete

View Collections

My Portfolio   ↑130,000

Target   2013 ▾

New Loan

Other Loan Officer Portlet?

Mifos – Individual Lending

Clients Loans Administration Accounting Reports

All ▾ Search

UserName

Loan Officer: Larry Lender

My Tasks ∧

1

Task bar opens horizontally, pushes portlets down

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

To-Do List

Wed, Jun 12, 2013

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Collections For:

May 16, 2013

82% complete

View Collections

My Portfolio

↑ 130,000

Target 2013 ▾

New Loan

Other Loan Officer Portlet?

Mifos – Individual Lending

Clients   Loans   Administration   Accounting   Reports   My Tasks   All ▾ Search   🔍   i ②   🇬🇧   UserName

1

1. Add a My Tasks menu
to the menubar

Loan Officer: Larry Lender

To-Do List   Wed, Jun 12, 2013

  8:00   Red Hat Ladies at Sacred Heart Elementary
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My New Clients   June 2013

[████████   15 more   ]

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Collections For: May 16, 2013

[82% complete   ]

View Collections

My Portfolio   ↑ 130,000

[████████████████   ]

Target   2013 ▾

New Loan

Other Loan Officer Portlet?

Mifos – Individual Lending

https://demo.openmf.org

Google

Clients   Loans   Administration   Accounting   Reports   My Tasks   All ▾ Search   UserName

1

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

To-Do List   Wed, Jun 12, 2013

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My New Clients

| 15 more |

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Collections For: May 16, 2013

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View Collections

My Portfolio   ↑130,000

Target   2013 ▾

New Loan

Other Loan Officer Portlet?

Mifos – Individual Lending

https://demo.openmf.org

Google

Mifos

Clients   Loans   Administration   Accounting   Reports

All ▾ Search

UserName

Account Settings
Logout

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?

- ☑ Checker Inbox
- ☑ To-Do List
- ☑ Clients In Arrears

- ☑ Collections
- ☑ Portfolio Progress
- ☑ New Client Progress

- ☐ Other
- ☐ Other
- ☐ Other

Graph Display

Loan Performance, PPI Graph, etc...

- ◉ Display graphs with tooltips text supplement
- ○ Display text only

My Common Tasks

2. User can turn display controls on/off

☑ 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

^

v

3

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