

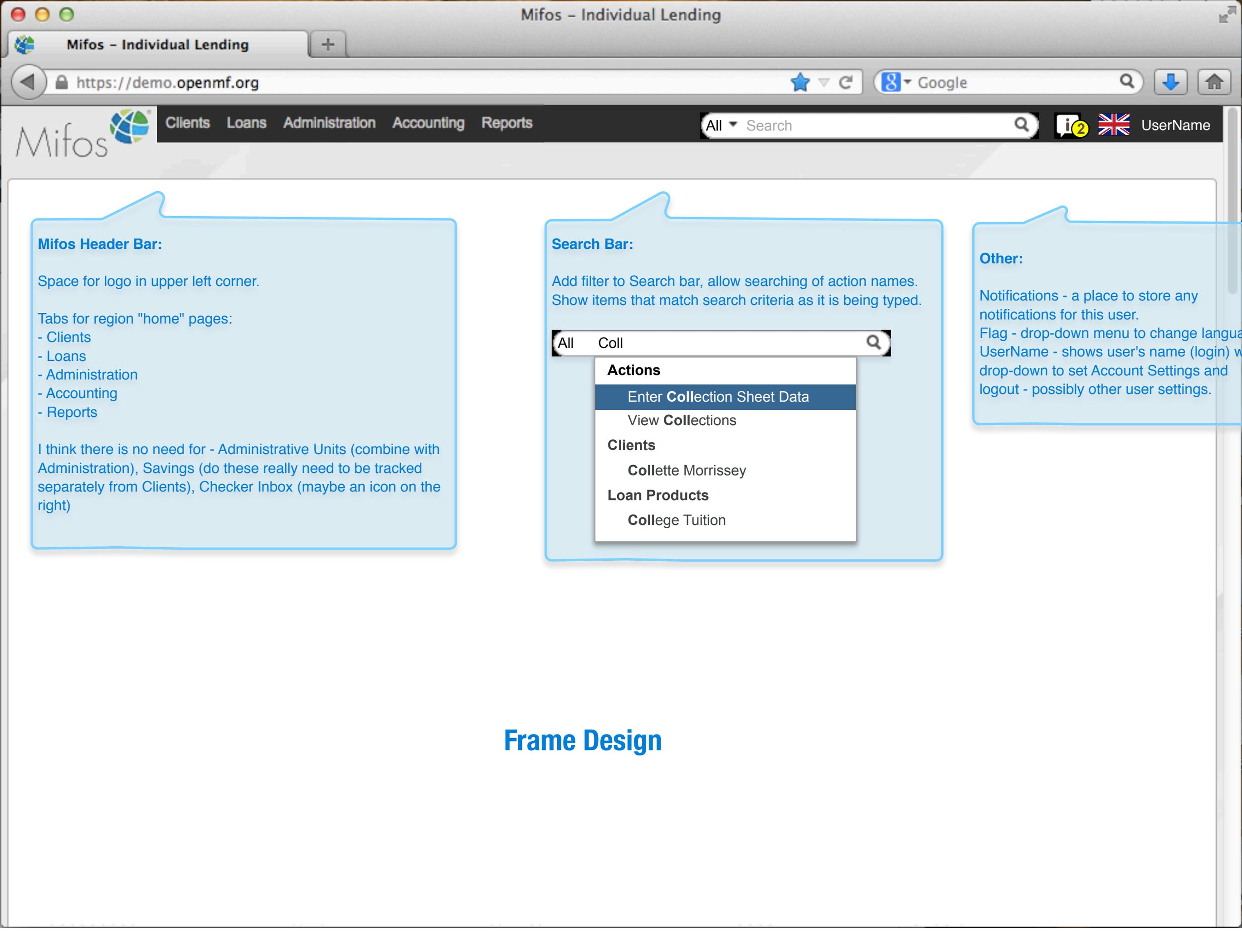
# **Client Page Layout Alternatives**

**(with Client & Loan Table column suggestions)**

**Deanna McCusker**

User Experience Designer

June 12, 2013



**Mifos Header Bar:**

Space for logo in upper left corner.

Tabs for region "home" pages:

- Clients
- Loans
- Administration
- Accounting
- Reports

I think there is no need for - Administrative Units (combine with Administration), Savings (do these really need to be tracked separately from Clients), Checker Inbox (maybe an icon on the right)

**Search Bar:**

Add filter to Search bar, allow searching of action names. Show items that match search criteria as it is being typed.

All Coll

**Actions**

- Enter **C**ollection Sheet Data
- View **C**ollections

**Clients**

- Collette Morrissey

**Loan Products**

- College Tuition

**Other:**

Notifications - a place to store any notifications for this user.

Flag - drop-down menu to change language.

UserName - shows user's name (login) with drop-down to set Account Settings and logout - possibly other user settings.

**Frame Design**



## Clients

 [New Client](#)

Search Clients

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

**Clients Home Page:**

**Clients** in large type followed by "New Client" action  
 Clients Table - columns pertinent to clients.

What columns should go here?

Loans

[New Loan](#)

Search Loans

Account Number	Loan Status	Loan Product	Total Outstanding	Principal	Loan Officer	Another Column
100000001	Active	Personal Loan	8,943	10,000	Lorenz Guzman	
100000002	Closed	Agricultural Loan	0	0	Lorenz Guzman	
100000003	Pending Approval	Home Loan	10,000	10,000	Lorenz Guzman	
100000004	Active	Car Loan	2,329	5,000	Sally Magalang	
100000005	Rejected	Emergency Loan	1,000	1,000	Lorenz Guzman	
100000006	Overpaid	Personal Loan	1,000	1,000	Sally Magalang	
100000007	Active	Agricultural Loan	2,312	4,000	Larry Lender	
100000008	Active	Business Loan	4,321	5,000	Lorenz Guzman	
100000009	Active	Business Loan	3,212	4,000	Lorenz Guzman	
100000010	Pending Approval	Business Loan	2,000	2,000	Lorenz Guzman	
100000011	Approved	Festival Loan	1,000	1,000	Larry Lender	
100000012	Active	Agricultural Loan	3,277	5,000	Larry Lender	
100000013	Active	Car Loan	1,278	1,500	Sally Magalang	
100000014	Closed	Business Loan	561	1,000	Larry Lender	
100000015	Active	Business Loan	567	1,000	Sally Magalang	
100000016	Closed	Business Loan	0	1,000	Sally Magalang	
100000017	Active	Agricultural Loan	42	1,000	Lorenz Guzman	
100000018	Active	Personal Loan	478	1,000	Sally Magalang	
100000019	Active	Personal Loan	214	500	Sally Magalang	
100000020	Active	Business Loan	3,167	4,000	Sally Magalang	

**Loan Home Page:**  
What columns should go here?



# Client Name

Bread > Crumb > Trail

Summary

Documents

Additional Info

Loan #1

Loan #2

Main Action | + Action #2 | + Action #2 | Actions

Popup Dialogs

### Key Points:

Client Name in big type  
Bread crumb trail to right of name

Tabs for client data:  
- 3 fixed (Summary, Docs, Additional Info)  
- transient for Loan and Savings details

Actions bar below tabs:  
Main Action - spacebar  
Other Primary Actions (optional) - spacebar  
All Actions dropdown menu  
Popup Dialog on right (optional)

Content area - see remaining screens for options

### Dialog

See All

Item 1...  
5 min ago

Item 2...  
12 hours ago

Item 3...  
Feb. 21, 2013

## Tab Design



### Client Name

Bread Crumb > Trail

Summary

Documents

Additional Info

Loan #1

Loan #2

Main Action

All Actions



Questions

Photo

Primary Data

GRAPH 2

GRAPH 1

Notes



Loan Accounts

Balance

Status

Savings Accounts

#### Client Layout 1 - Key Points:

- Photo to left
- Primary Data and 2 spots for graphs (or text) across top
- Loan and Savings aligned with Primary Data
- Notes display on right
- Questions as a popup in actions bar



## Claire Client

Branch > Center > Group > Claire Client

Summary

Documents

Additional Info

Loan #1

Loan #2

Edit Client

Actions

Questions

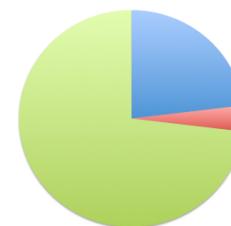


Account No.: **200152006**  
 External ID: 532921843  
 Activation Date: 02 April 2012  
 Office: Bangalore  
 Group: Triangle Group  
 Loan Officer: Lorenz Guzman  
 Loan Cycle: 2

PPI - 2.45



Loan Performance



Notes

**Lorenz Guzman:**  
Will miss Tuesday, Jun. 11, 2013 mtg. On vacation.  
5 min ago

**System Admin:**  
Transferred from Larry Lender to Lorenz Guzman on Jun 4, 2013.  
12 hours ago

**Larry Lender:**  
Added national ID card.  
Feb. 21, 2013

**System Admin:**  
Another note.  
Feb. 19, 2013

**System Admin:**  
Yet another note.  
Feb. 19, 2013

**System Admin:**  
Client created.  
Dec. 11, 2012

### Loan Accounts

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

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

Example of layout



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

[Summary](#)
[Documents](#)
[Additional Info](#)
[Loan #1](#)
[Loan #2](#)

Edit Client
 New Loan
 New Savings



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

**PPI Scores**

2.45 - 7 Jul 2012  
 1.98 - 15 Dec 2011  
 2.10 - 2 Jun 2011

Due again in 4 weeks

**Loan Performance**

Balance: 8,329  
 Due Weekly: 511  
 Active Loans: 3  
 Delinquent: 1,256  
 Savings: 5,212  
 Mtgs Attended: 9  
 Mtgs Missed: 0

**Notes**

[Lorenz Guzman:](#)  
 Will miss Tuesday, Jun. 11, 2013 mtg. On vacation.  
 5 min ago

[System Admin:](#)  
 Transferred from Larry Lender to Lorenz Guzman on Jun 4, 2013.  
 12 hours ago

[Larry Lender:](#)  
 Added national ID card.  
 Feb. 21, 2013

[System Admin:](#)  
 Another note.  
 Feb. 19, 2013

Loan Accounts	Balance	Status
<a href="#">Standard Client Loan</a> #0012013562	-11,356.2	Active in Bad Standing
<a href="#">Home Loan</a> #0012031092	-8,245.0	Application Approved
<a href="#">Car Loan</a> #0012020099	-2,000	Pending Approval
<a href="#">Agriculture Loan</a> #0012010104	-562.0	Active
<a href="#">Agriculture Loan</a> #0012010105	-1,000	Active

Savings Accounts	23% of loan value
<a href="#">Mandatory Savings</a> #0023024128	4750.0 Active
<a href="#">Individual Savings</a> #0023016348	462 Active

**Question Groups**

PPI India 12-Oct-2012  
 Client Survey 24-Jul-2012

Example showing Question groups below Notes instead of as popup in actions bar.





## Claire Client

Branch > Center > Group > Claire Client

Summary

Documents

Additional Info

Loan #1

Loan #2

Edit Client

+ New Loan

+ New Savings

All Actions

Questions

Notes

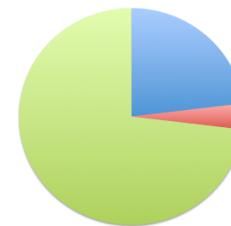


Account No.: **200152006**  
 External ID: 532921843  
 Activation Date: 02 April 2012  
 Office: Bangalore  
 Group: Triangle Group  
 Loan Officer: Lorenz Guzman  
 Loan Cycle: 2

PPI - 2.45



Loan Performance



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

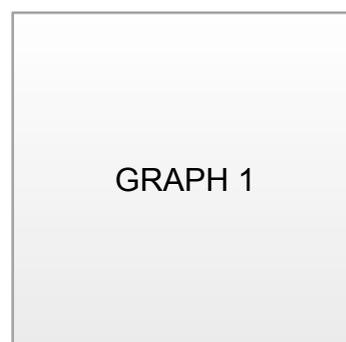
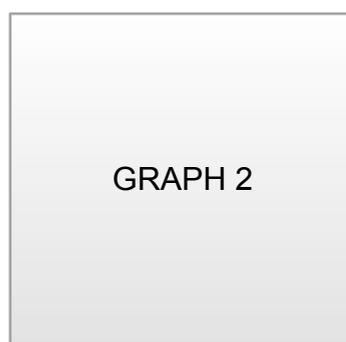
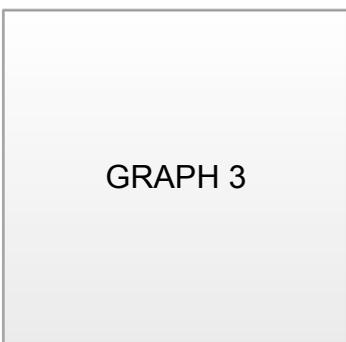
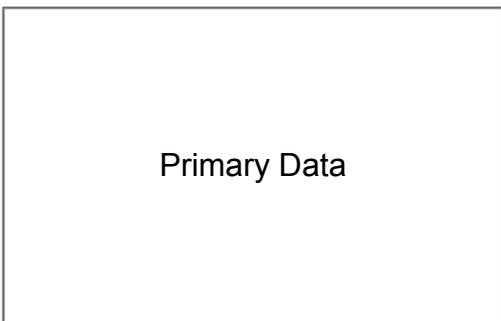
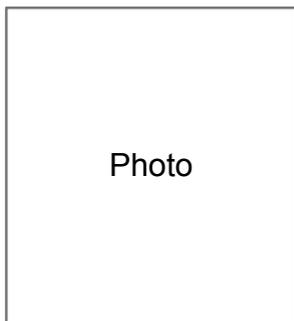
Example showing Question groups with Notes as popups in actions bar.



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

Summary Documents Additional Info Loan #1 Loan #2

Edit Client + New Loan + New Savings Actions Questions Notes



Loan Accounts	Balance	Status	Coming Due	Overdue	Interest (per year)

Savings Accounts	Coming Due	Interest (per year)

**Client Layout 3 - Key Points:**

- Photo to left
- Primary Data and 3 spots for graphs (or text) across top
- Loan and Savings aligned with Primary Data
- No display to right
- Questions and Notes as popups in actions bar



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

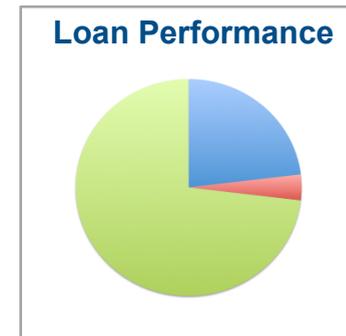
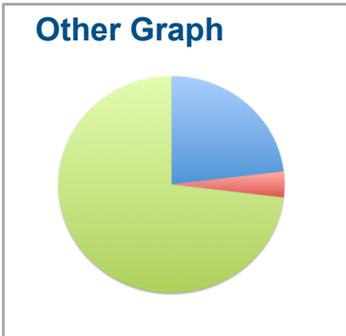
[Summary](#)
[Documents](#)
[Additional Info](#)
[Loan #1](#)
[Loan #2](#)

[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		Balance	Status	Coming Due	Overdue	Interest (per year)
<a href="#">Standard Client Loan</a>	#0012013562	-11,356.2	Active in Bad Standing	245.0	1156.2	12% declining balance
<a href="#">Home Loan</a>	#0012031092	-8,245.0	Application Approved	164.0	0	12% declining balance
<a href="#">Car Loan</a>	#0012020099	-2,000	Pending Approval	0	0	36% declining balance
<a href="#">Agriculture Loan</a>	#0012010104	-562.0	Active	100.0	0	3% declining balance
<a href="#">Agriculture Loan</a>	#0012010105	-1,000	Active	100.0	0	2.5% declining balance

Savings Accounts				Coming Due	Interest (per year)
<a href="#">Mandatory Savings</a>	#0023024128	4750.0	Active	100.0	12%
<a href="#">Individual Savings</a>	#0023016348	462.3	Active	0	12%



### Claire Client

Branch > Center > Group > Claire Client

Summary

Documents

Additional Info

Loan #1

Loan #2

Edit Client

+ New Loan

+ New Savings

Questions

Notes

Photo

Primary Data

GRAPH 2

GRAPH 1

#### Performance History

Loan Accounts

Balance

Status

Coming Due

Overdue

Interest

Savings Accounts

Coming Due

Interest

#### Question Groups

#### Client Layout 4 - Key Points:

- Photo to left
- Primary Data and 2 spots for graphs (or text) across top
- Loan and Savings aligned with **Photo Performance (or notes) to right**
- Questions (and Notes) as popups in actions bar



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

[Summary](#)
[Documents](#)
[Additional Info](#)
[Loan #1](#)
[Loan #2](#)

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



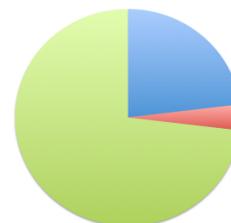
Account No.: **200152006**  
 External ID: 532921843  
 Activation Date: 02 April 2012  
 Office: Bangalore  
 Group: Triangle Group  
 Loan Officer: Lorenz Guzman  
 Loan Cycle: 2

PPI - 2.45



12-Dec-2012

Loan Performance



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		Coming Due	Overdue	Interest
Standard Client Loan	#0012013562	-11,356.2	Active in Bad Standing		245.0	1156.2	12%
Home Loan	#0012031092	-8,245.0	Application Approved		164.0	0	12%
Car Loan	#0012020099	-2,000	Pending Approval		0	0	36%
Agriculture Loan	#0012010104	-562.0	Active		100.0	0	3%
Agriculture Loan	#0012010105	-1,000	Active		100.0	0	3%

Savings Accounts					Coming Due	
Mandatory Savings	#0023024128	4750.0	Active		100.0	12%
Individual Savings	#0023016348	462.3	Active		0	12%

Question Groups

PPI India	12-Oct-2012
Client Survey	24-Jul-2012

Example showing Question groups below Performance History.



### Client Name

Bread Crumb > Trail

Summary

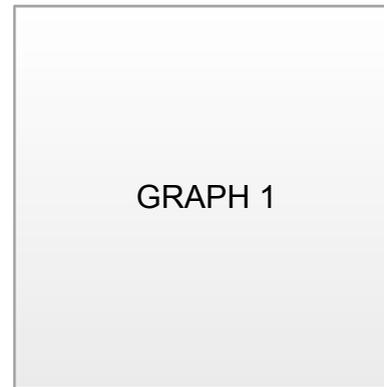
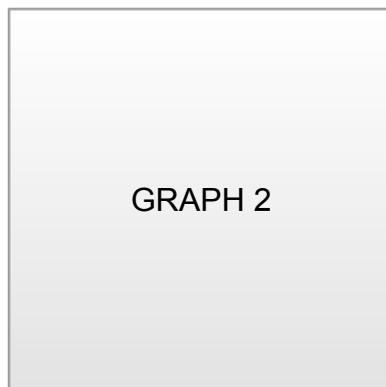
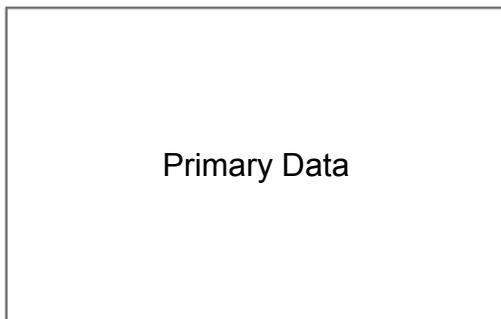
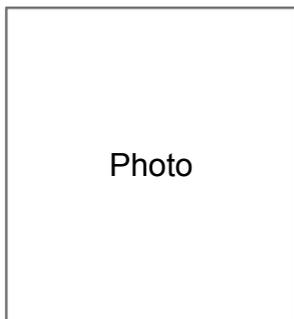
Documents

Additional Info

Loan #1

Loan #2

Main Action | + New Loan + New Savings | All Actions



Notes +

Loan Accounts	Balance	Status

Performance History

Savings Accounts

Question Groups +

**Client Layout 5 - Key Points:**

- Photo to left
- Primary Data and 2 spots for graphs (or text) across top
- Loan and Savings aligned with Primary Data
- Notes, Performance History, and Question Groups all on right.** (might be difficult to align these with the loan and savings accounts unless we use scrollbars.)





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

[Summary](#)
[Documents](#)
[Additional Info](#)
[Loan #1](#)
[Loan #2](#)

Edit Client
 New Loan
 New Savings
 All Actions

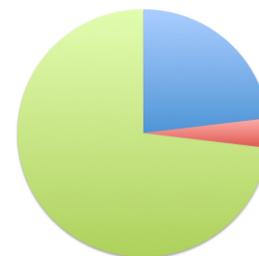


Account No.: **200152006**  
 External ID: 532921843  
 Activation Date: 02 April 2012  
 Office: Bangalore  
 Group: Triangle Group  
 Loan Officer: Lorenz Guzman  
 Loan Cycle: 2

PPI - 2.45



Loan Performance



History Notes

Performance	
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	3 Active	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

Question Groups

PPI India	12-Dec-2012
Client Survey	30-Jun-2011