

Mifos Workflow

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Login


User Name:

Password:

Home Page Components

- Header region
 - Contains links to 2nd level regions, settings, login, other?
- Dashboard - data specific to user
 - Loan officer
 - Field office assistant
 - Manager
 - System Administrator
 - Perhaps add a graphic showing how close user is to their current goal (20 new clients, >20% delinquent?)
- Tasks – buttons/links to user specific tasks

Loan Officer Dashboard

Mifos  Clients Administration Accounting Reports Settings | Logout


Loan Officer: Lisa Lender

[New Client](#)

[New Account](#)

[Enter Collections](#)

[All Clients](#)

My Goal Status: 

Collections This Week – datagrid with links
[Loan 1](#)
Loan 2

Top 10 Delinquent – datagrid with links
Loan 1
Loan 2

Top 10 Performance – datagrid with links
Loan 1
Loan 2


Tasks from Manager – datagrid with links
Task 1
Task 2

Details:

Left navigation bar for most common tasks for this user on this page

Dashboard to show most useful information for this user when logging in: what do I need to do today/this week? What are my goals? How am I doing towards my goals?

Field Office Assistant Dashboard

Mifos  Clients Administration Accounting Reports Settings | Logout

Field Office Assistant: Frank Foa


[New Client](#)

[New Account](#)

[Enter Collections](#)

Create Collection Sheet

[All Clients](#)

My Goal Status: 

Loan Officer Collection Sheets – datagrid with links

Collection Sheet Entry for Today

Top Delinquent Accounts – datagrid with links

[Loan 1](#)


Loan 2

Tasks from Manager – datagrid with links

Task 1

Task 2

Manager Dashboard


Mifos  Clients Administration Accounting Reports Settings | Logout

Branch Manager: Maria Manager

[Loan Approvals](#)

Chart of
Accounts

Week End Status

My Goal Status: 


Loans Awaiting Approval – datagrid with links
 Loan 1
 Loan 2

Top 10 Delinquent Loans – datagrid with links
 [Loan 1](#)
 Loan 2

Top Performing Loan Officers – datagrid with links
 Loan Officer 1
 Loan Officer 2

Branch Performance - chart

Sys Admin Dashboard


Mifos  Clients Administration Accounting Reports Settings | Logout

Systems Administrator: Andy Admin

Performance History

Week End Status

Updates


My Goal Status: 

System Performance: Last 10 days

System Running Since: 3/15/2013

New version available: Upgrade to Mifos 3.0!

Client Page

Mifos  Clients Administration Accounting Reports Settings | Logout


Branch > Center > Group > Claire Client

Client: Claire Client


[New Loan](#)

[New Savings](#)


[Edit Client Data](#)




Active
ID: 00002-12
Loan Officer: Lisa Lender



Loan Performance

Loan 1 

Loan Name and Number
Outstanding Balance:
Amount Due:

Loan 2 


Loan Name and Number
Outstanding Balance:
Amount Due:

Performance History:

Other Data

Details:
Show a graph of this person's loan performance? Perhaps the first (or selected) loan?
Use large icons to distinguish the status of loans
Use color blocks to differentiate between loans, performance history, and other data

Loan Page

Mifos  Clients Administration Accounting Reports Settings | Logout

Branch > Center > Group > Claire Client > Loan 1


Loan: **Loan 1 #000213859**

Apply Payment


Apply Charges

Apply Adjustment

Repay Loan



Active in Bad Standing
ID: 00002-12
Loan Officer: Lisa Lender



Loan Performance

Account Summary

Total Amount Due:
Amount in Arrears:
Principal:
Interest:
Fees:
Penalty:
Total:


Account Details:

Other Information:

Performance History:

Details:
Use a graph to show the performance of this loan?

New Client Page

Mifos  Clients Administration Accounting Reports Settings | Logout

Branch > Center >

Group:

Loan Officer Assigned:

Personal Info

Name:

Govt. ID:

Photo:

Etc...

MFI Info


Administrative Fees:

Other Fees:

Create Savings Account:

Etc...

New Loan Page (Generic)

Mifos  Clients Administration Accounting Reports Settings | Logout

Branch > Center >

Group:

Borrower:


Loan Product:

Loan Account Details
Loan Amount:
Interest Rate:
Number of Installments:
Disbursal Date:

Administrative Fees
Additional Fees
Miscellaneous

Etc...

New Loan Page (from Client)

Mifos  Clients Administration Accounting Reports Settings | Logout

Branch > Center >

Group:

Borrower: Claire Client


Loan Product:

Loan Account Details
Loan Amount:
Interest Rate:
Number of Installments:
Disbursal Date:

Administrative Fees
Additional Fees
Miscellaneous

Etc...

All Clients (specific to LO)

Mifos  Clients Administration Accounting Reports Settings | Logout

Loan Officer: **Lisa Lender** Search:


[New Client](#)

[New Account](#)

[Enter Collections](#)

Last	First	Number	Status	Balance	Days Delinquent
Client	Claire	0002-12...	Active	570.0	25
Gomez	Carlos	0002-12...	Active	1234.0	11
Alvar...	Pepe	0002-12...	Active	25.0	

All Clients (specific to FOA)

Mifos  Clients Administration Accounting Reports Settings | Logout

Loan Officer: Search:


[New Client](#)

[New Account](#)

[Enter Collections](#)

Last	First	Number	Status	Balance	Days Delinquent
Client	Claire	0002-12...	Active	570.0	25
Gomez	Carlos	0002-12...	Active	1234.0	11
Alvar...	Pepe	0002-12...	Active	25.0	

All Clients (specific to Manager)

Mifos  Clients Administration Accounting Reports Settings | Logout

Branch:
Loan Officer: Search:


Loan Officer
Performance Report



Last	First	Number	Status	Balance	Days Delinquent
Client	Claire	0002-12...	Active	570.0	25
Gomez	Carlos	0002-12...	Active	1234.0	11
Alvar...	Pepe	0002-12...	Active	25.0	








Delinquency
Report

Branch
Performance

Enter Collection Sheet Data

Mifos  Clients Administration Accounting Reports Settings | Logout

Center:  Branch Office: Loan Officer: Payment Type: 

Borrower	Due/Collections				Issues/Withdrawals				Attention
	ADM	LTL	SA	DCF	ADM	LTL	SA	DCF	
Group 100									
Komik Batmana	<input type="text" value="100.0"/>			<input type="text" value="75.0"/>			<input type="text" value="250.0"/>		<input type="text" value="Present"/> 
Tymteusz Otwarty	<input type="text" value="100.0"/>						<input type="text" value="0.0"/>		<input type="text" value="Absent"/> 
Mohamed Adil	<input type="text" value="100.0"/>						<input type="text" value="0.0"/>		<input type="text" value="Present"/> 
Group accounts(s)							<input type="text" value="0.0"/>		<input type="text" value="Present"/> 
Group Total	<input type="text" value="400.0"/>	<input type="text" value="0.0"/>	<input type="text" value="0.0"/>	<input type="text" value="75.0"/>	<input type="text" value="0.0"/>	<input type="text" value="0.0"/>	<input type="text" value="250.0"/>	<input type="text" value="0.0"/>	
Group ABC									
SHG Client		<input type="text" value="100.0"/>					<input type="text" value="0.0"/>		<input type="text" value="Late"/> 
Tet sw Tes asas		<input type="text" value="75.0"/>					<input type="text" value="0.0"/>		<input type="text" value="Present"/> 
Client test211		<input type="text" value="125.0"/>					<input type="text" value="0.0"/>		<input type="text" value="Present"/> 
Group accounts (s)									
Group Total	<input type="text" value="0.0"/>	<input type="text" value="225.0"/>	<input type="text" value="0.0"/>	<input type="text" value="0.0"/>	<input type="text" value="400.0"/>	<input type="text" value="0.0"/>	<input type="text" value="0.0"/>	<input type="text" value="75.0"/>	
Total Collections	Total Issues/Withdrawals								

Danona Car Finance Loan

Details:


Use striping to distinguish one row from another, use color to distinguish money in vs. money out

Use tooltips to spell out loan product names, spell out Attention labels (Present, Absent, Approved Absence, Late)

Enter date and payment type right on form? No need for entry page (center, branch, LO determined by login)

Change text color of changed amounts right on this page

Loan Approvals

Mifos  Clients Administration Accounting Reports Settings | Logout

Branch Manager: Maria Manager

<input type="checkbox"/>	Account ID	Loan Amount	Disbursal Date	Borrower	Loan Officer	Center
<input type="checkbox"/>	00100000001120	500,000	13 – Apr – 2013	SHG Client 34	Kim Huch Sieng	Boeung Salang
<input type="checkbox"/>	00100000001129	5,000	15 – Apr – 2013	Raj D	Kim Huch Sieng	Boeung Salang
<input type="checkbox"/>	00100000001237	2,000	15 – Apr – 2013	Komik Batmana	Kim Huch Sieng	Boeung Salang
<input type="checkbox"/>	00100000001242	500,000	18 – Apr – 2013	Tet sw Tes asas	Jenna Barth	Test Center
<input type="checkbox"/>	00100000001243	500,000	13 – Apr – 2013	Client test233	Kim Huch Sieng	Boeung Salang
<input type="checkbox"/>	00100000001244	500,000	9 – Apr – 2013	Claire Client	Ank G	Boeung Salang
<input type="checkbox"/>	00100000001245	500,000	15 – Apr – 2013	Another client	Ank G	Boeung Salang
<input type="checkbox"/>	00100000001246	2,345	12 – Apr – 2013	Someone else	Jenna Barth	Test Center
<input type="checkbox"/>	00100000001400	12,457	15 – Apr – 2013	Yet another	Jenna Barth	Test Center

Notes:


Details:

Use striping to distinguish one row from another

No need for redundant info: current status (they are all pending), words "Account #", branch (if approved at branch level)

Put borrower, loan officer, and center (and branch?) in separate columns so they can be sorted on


Loan Page (pending approval)

Mifos  Clients Administration Accounting Reports Settings | Logout

Branch > Center > Group > Claire Client > Loan 1

Loan: **Loan 1 #000213859**

Approve Loan



Application Pending Approval
ID: 00002-12
Loan Officer: Lisa Lender

Account Summary
Total Amount Due:
Amount in Arrears:
Principal:
Interest:
Fees:
Penalty:
Total:

Account Details:

Other Information:

Details:

If the user looking at this page is authorized to approve, show Approve Loan button.