Mifos Workflow

Deanna McCusker
UX Designer
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Login

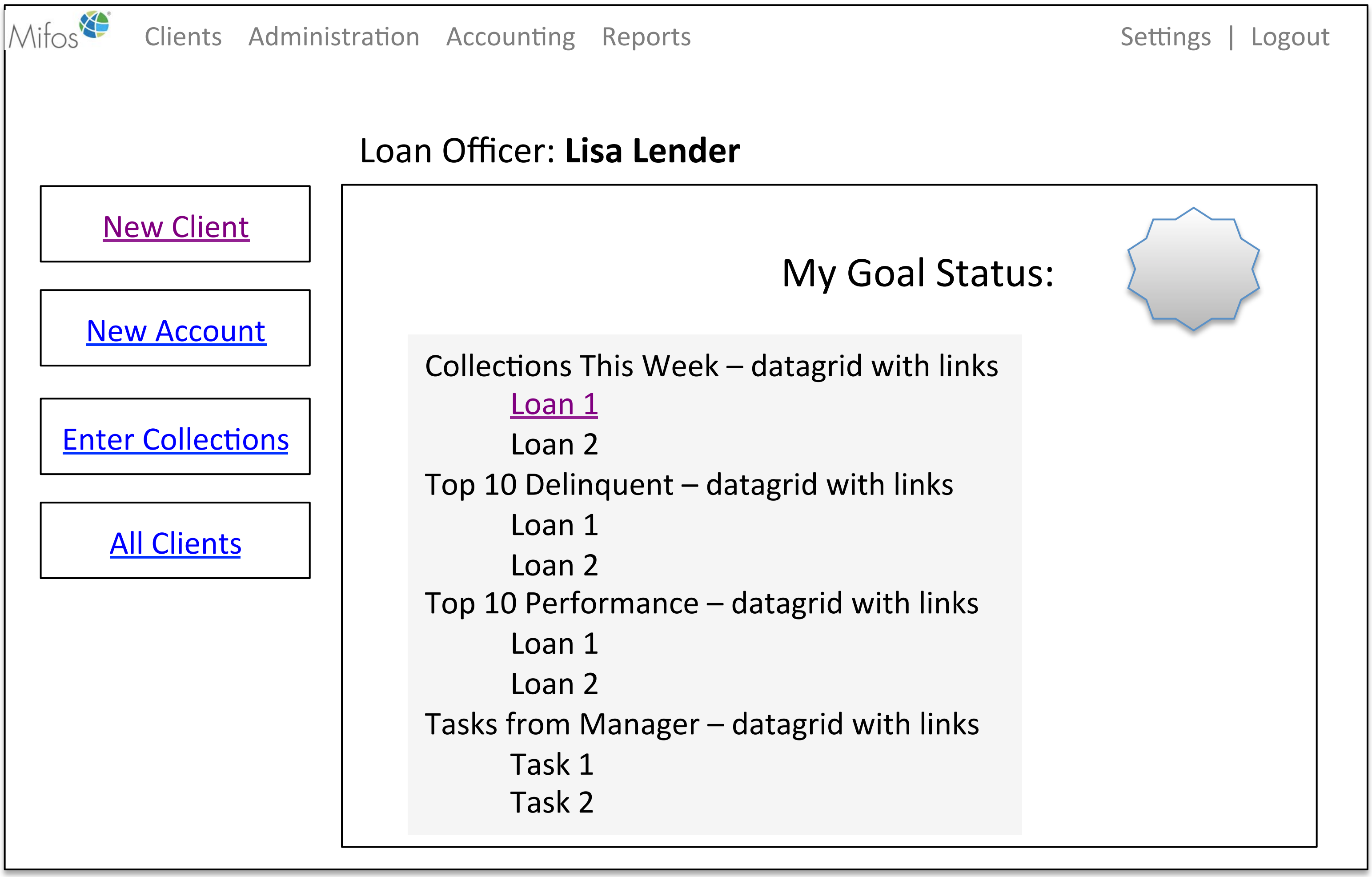
User Name:

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



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**

Loan Approvals

Chart of Accounts

Week End Status

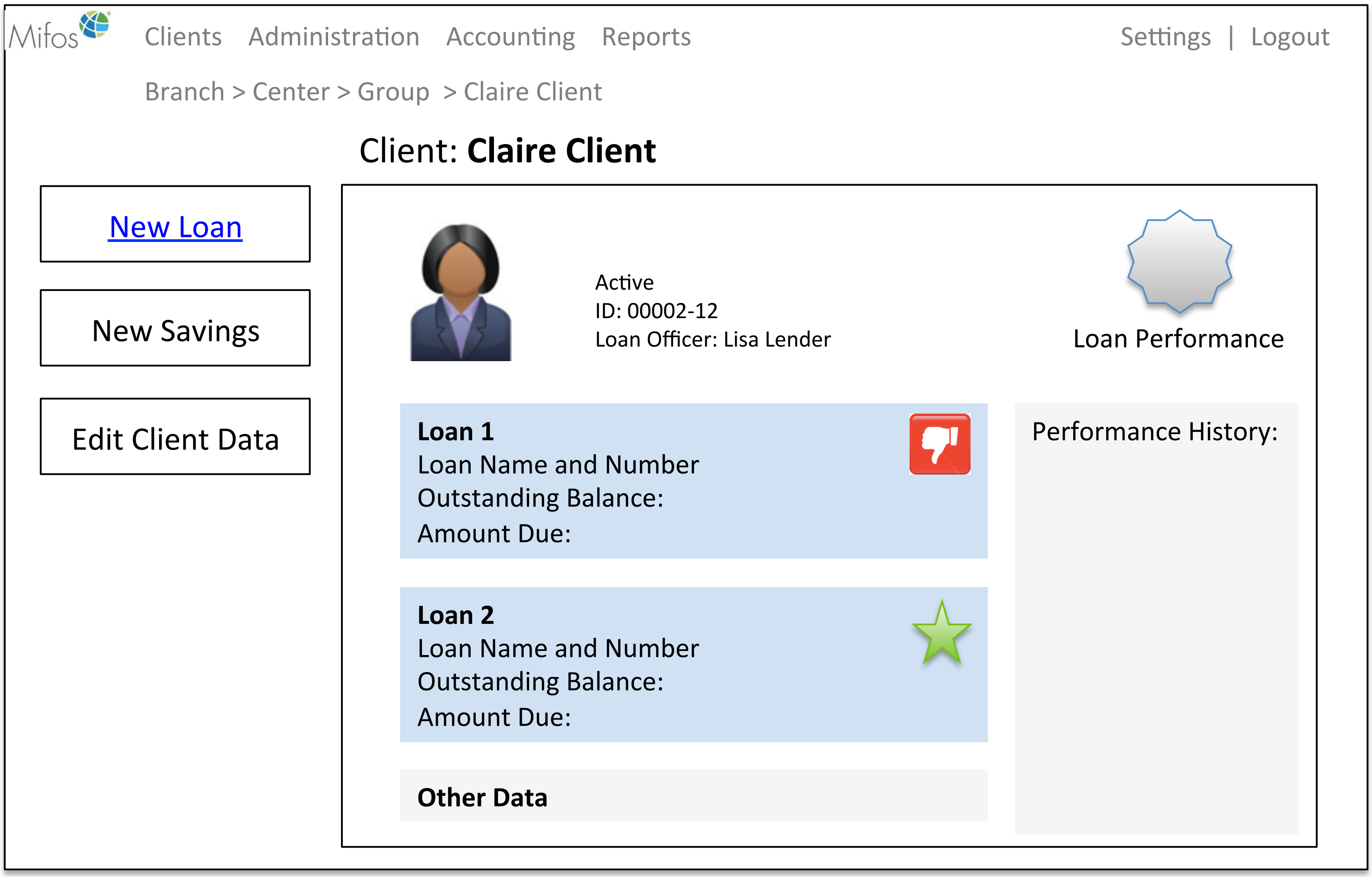
My Goal Status:

System Performance: Last 10 days

System Running Since: 3/15/2013

New version available: Upgrade to Mifos 3.0!

Client Page



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:

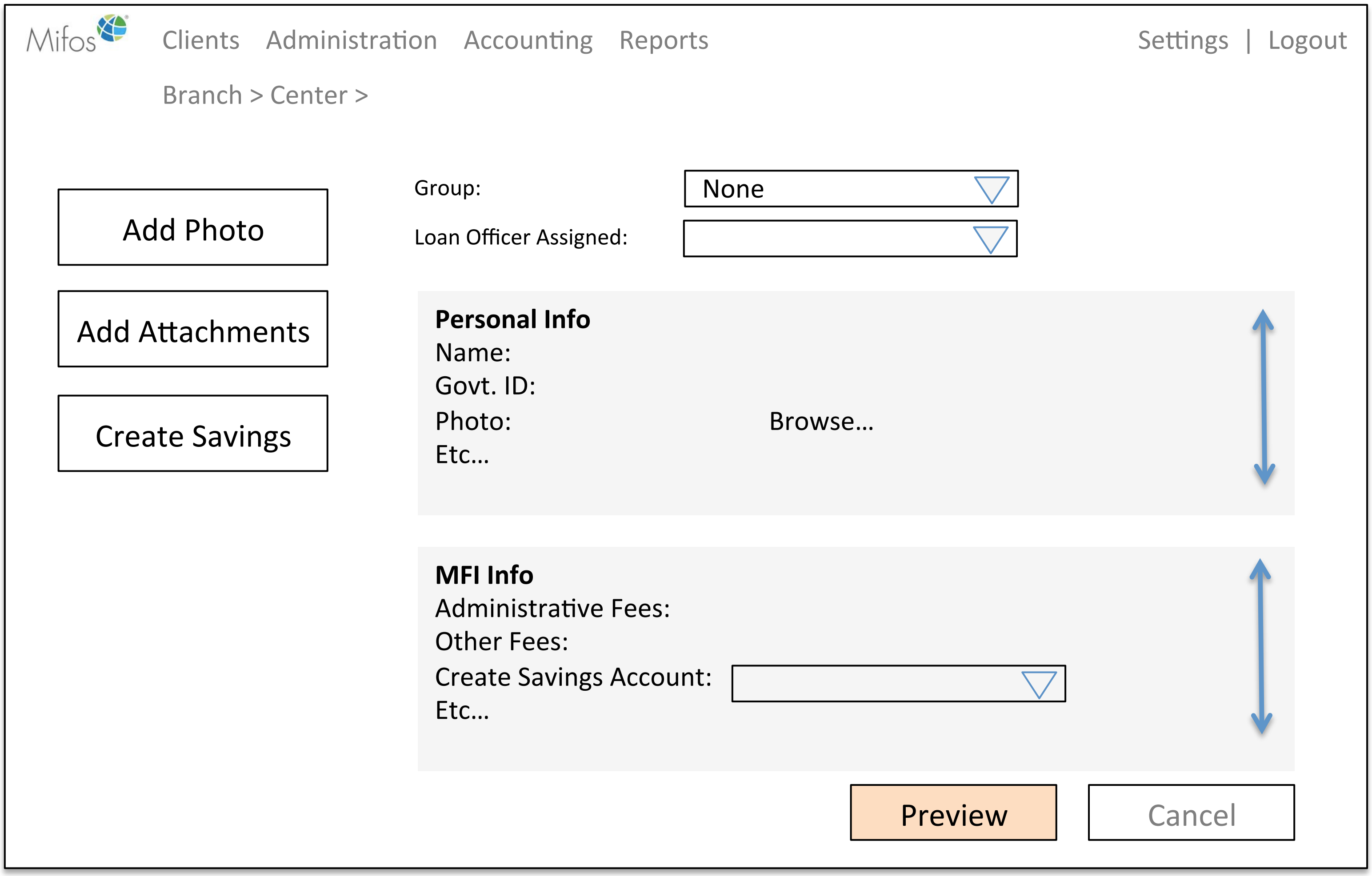
Performance History:

Account Details:

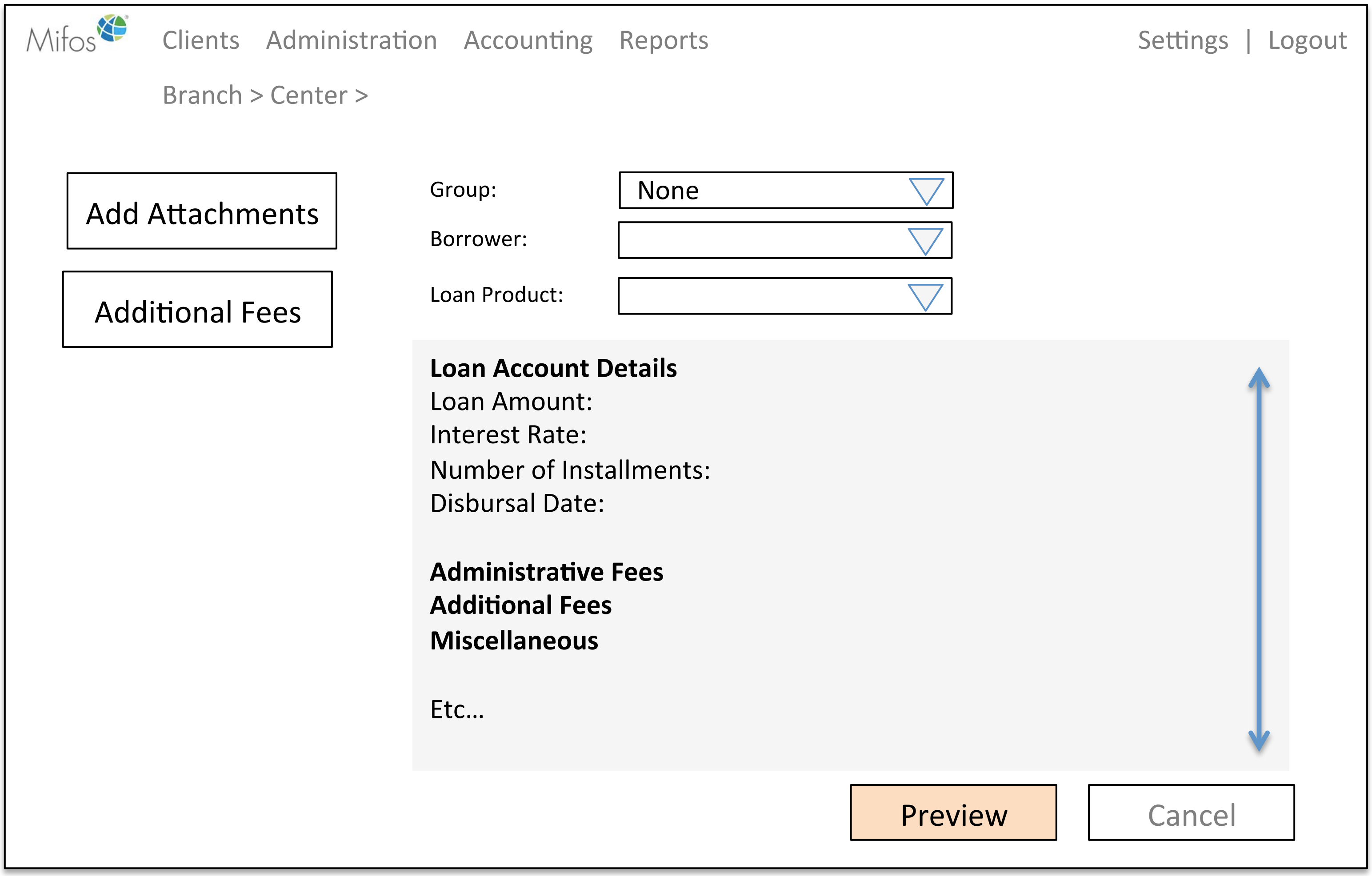
Other Information:

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

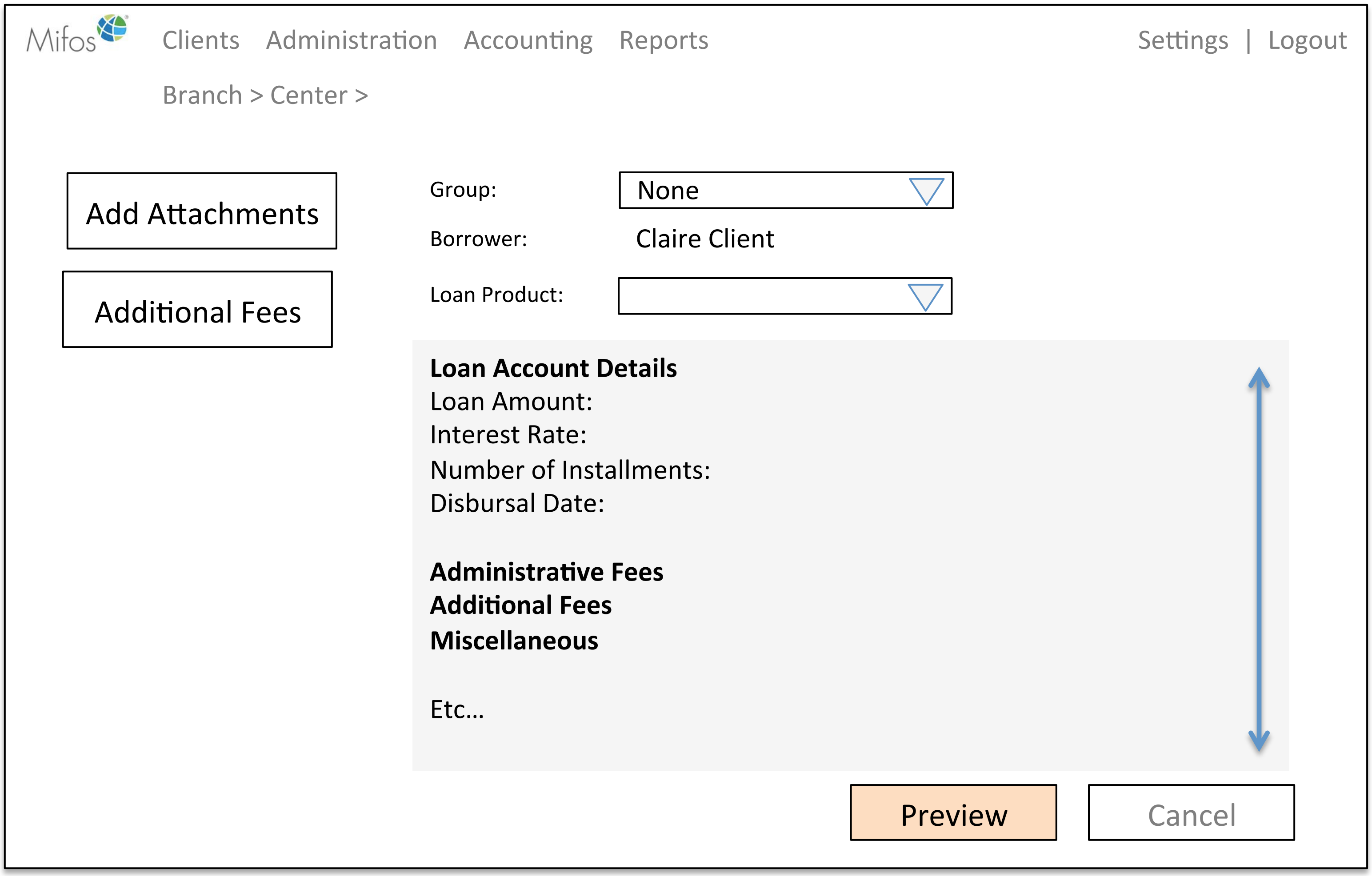
New Client Page



New Loan Page (Generic)



New Loan Page (from Client)



All Clients (specific to LO)

Mifos Clients Administration Accounting Reports Settings | Logout

Loan Officer: **Lisa Lender** Search:

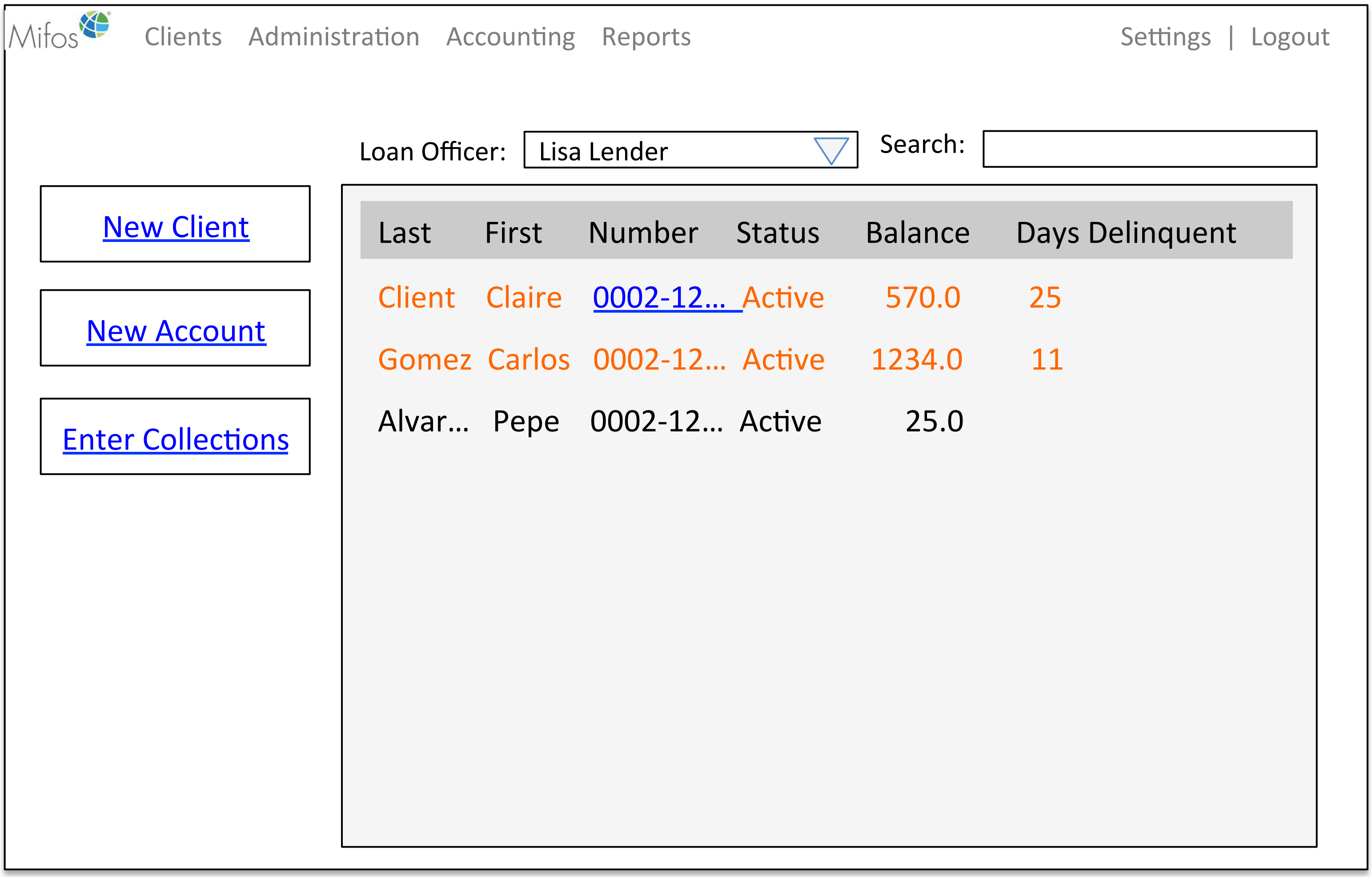
New Client

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)



All Clients (specific to Manager)

Mifos Clients Administration Accounting Reports Settings | Logout

Branch: Nairobi A

Loan Officer: All

Search:

Loan Officer Performance Report

Delinquency Report

Branch Performance

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	

Enter Collection Sheet Data

Mifos Clients Administration Accounting Reports Settings | Logout

Center: Boeung Salang
Date: April 12, 2013

Branch Office: ADMCambodia
Loan Officer: Kim Huch Sieng

Payment Type: Cash

Danona Car Finance Loan

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

Total Collections **Total Issues/Withdrawals**

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**

	Account ID	Loan Amount	Disbursal Date	Borrower	Loan Officer	Center
☐	001000000001120	500,000	13 – Apr– 2013	SHG Client 34	Kim Huch Sieng	Boeung Salang
☐	001000000001129	5,000	15 – Apr– 2013	Raj D	Kim Huch Sieng	Boeung Salang
☐	001000000001237	2,000	15 – Apr – 2013	Komik Batmana	Kim Huch Sieng	Boeung Salang
☐	001000000001242	500,000	18 – Apr – 2013	Tet sw Tes asas	Jenna Barth	Test Center
☐	001000000001243	500,000	13 – Apr – 2013	Client test233	Kim Huch Sieng	Boeung Salang
☐	001000000001244	500,000	9 – Apr – 2013	Claire Client	Ank G	Boeung Salang
☐	001000000001245	500,000	15 – Apr – 2013	Another client	Ank G	Boeung Salang
☐	001000000001246	2,345	12 – Apr – 2013	Someone else	Jenna Barth	Test Center
☐	001000000001400	12,457	15 – Apr – 2013	Yet another	Jenna Barth	Test Center

Notes:

Approve

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.