

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

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

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

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:

Other Data

Performance History:

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:

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	