**Finsis Menu features**

**1.Dashboard**

To display reports in graphic modes for quick analysis.

Is divided into five grids

**Grid 1**

Has number of centers, number of clients, Number of newly added clients, total closed clients

**Grid 2**

Has a doughnut chart showing active and loans in arrears.

**Grid 3**

OLB graph where you can search and view based on office type(e.g head office or sub station)

**Grid 4**

Has a list of the logged in user

**Grid 5**

It's 100% full on the display page below the above grods. A graphic table showing the OLB, overdues per number of days

**2.Create**

Has these activities in a drop down

* **New group**

Details(New group name, Location,Time, Day,creation date, Office type (e.g Head office, level type(eg HQ), branch, Officer)

* **New client**

KYC(Names, Next of kin, National ID, county, sub county, village, nearest landmark, phone number)

* **New loan**

Has 3 steps

**a. Loan creation**

Loan details(Principal amount, interest rate, loan term, lif fee, Laf fee, insurance fee, creation date, loan start date, loan end date automatic generated, default end date)

**b. Approve**

(Approval date, loan end date loaded auto, loan amount loaded auto, loan product)

**c. Disburse**

It's merely a confirmation of the above

**3.Individual client information**

All clients are displayed under this menu when accessed.

When a client is clicked, or is displayed from a search, when they appear they display personal info that's read only and below will have buttons for ( **Account** and **edit personal details** )

* **Edit personal details**

Have details like creation date, approval, the center, the branch, ID details, places, passport photo are displayed, ideally it's exactly the data required when a client is created.

* **Account**

This part will display the accounts a client has (**Jaza Savings**, **Mradi acc**, **Boresha debit acc**(BDA), **Emergency acc**)

Below this part is a table that displays all the loans a client has

Every single loan info in the table is clickable to display the loans data, and for edit purposes, the buttons for editing purpose are **repay, reschedule, abandon, close.** The system is automatic and therefore activities like repayment, scheduling loan for next repayment and closing of loan are happening automatically. But incase of an error done while creating a loan the editing buttons are useful**. All the activities are sensitive and therefore are only assigned to users who are authorized.**

**Repay**

If one opts to manually repay then they can do it. So when this button is invoked displays a popup window. The payment methods to choose under this include (**Mradi acc**, **Jaza savings**, **Boresha debit** acc for loan(BDA), **journal entry.** This is a restricted activity and has steps before arriving to this decision

**Reschedule**

For the loans incase entries were done wrongly. This will literally invoke the loan creation page to edit the needed entries,e.g loan item name, date of disbursement, loan start up date. This is a restricted activity and has steps before arriving to this decision

**Closing**

For loans to clear up arrears, or when there is a need for immediate closure of loan.This is a restricted activity and has steps before arriving to this decision

**Abandon**

This applies when a item no longer serves the needs of client and it was returned back to office. This is a restricted activity and has steps before arriving to this decision

**4.Groups/centers**

When accessed will display all groups in a table groups(centers) with details like center name, office type, branch, officer, number of clients. As well every row representing a group information in the table is clickable to display all the details of the group and has button for editing purpose. **This is visible to admins or super users account or users with special permissions**

To an officer groups displayed on a table will be the officers groups only and on **read only mode**

**5.Transactions**

Has sub menus as below on drop down

* **All officer entries**

These are the posting entries report done by the officer during the day, posting for clients payments

* **Disbursements**

All loans disbursed where information can be accessed based on dates or time the user require i.e in terms of time of the transaction, day, week,month, year,

**6.Reports**

Includes all the reports in the system generated in excel format

* **Collections/entries**

Per officer

Per branch

Per center

* **Sales**

All sales done per day

Sale done per week

Sales done per month

* **OLB(outstanding loan balance)**

Per officer

Per office type

Company OLB

* **Arrears**

Daily, weekly, 30 days

* **Clients demography**

Clients with details, which can be obtained either from Office type(e.g Head office), level type(e.gKinango branch) or center(e.g Baraka Mwatsalafu)

* **Disbursements**

Done in the day, weekly, month

* **Inventory**

In stock

Out stock

Closing stocks and opening stocks

* **Forecasting**

Incoming arrears reports

* **Bulk action reports**

User activities

**7.Roles**

-Super user

-Admin

-Users with special access

-Normal user