**Type of Portal**

1. Super-Admin
2. Employee – Collection Agent
3. Client

**Super Admin**

1. Login
2. Dashboard
3. Employee Management
4. Client Management
5. Loan Management
6. Reports

**Employee Panel**

1. Login
2. Dashboard
   1. Today’s Collection List
3. Reports
   1. Date-wise
   2. Client-wise

**Client Panel**

1. Login
2. Dashboard
3. Loan Details
4. Loan Payment History

**Login System:**

All Login will have session where if the person is idle the portal will auto logout for advanced security.

Super Admin: Username and Password

Employee: Username and Password

Client: Mobile (username) and Pan number (Password)

**Password Recovery**

Super Admin: Can Change inside the Admin portal

Employee: Can change from admin portal.

Client: Password can’t be changed.

**Super Admin**

**Dashboard:**

* + 1. Total Collection
    2. Total Outstanding
    3. Total Loan Disbursement
    4. Total Interest
    5. Total Loans Accounts
    6. Present Balance (Credit – Debit = Present Balance)

**Employee Management**

Admin can create, edit and remove the employee. Also admin can able to transfer the client to another employee(Collection Agent).

* + 1. Name
    2. C/O
    3. DOB
    4. mobile
    5. Alt mobile
    6. Photo
    7. Address
    8. Joining Date
    9. Username
    10. password.

**Client Management**

Admin can create a client and assign loans under them, only one loan will be active on each client and there won’t be any loan changes once the loan is created. Once the tenure of the loan is over, admin can reassign the loan to the same client.

1. Name
2. Mobile
3. Alt Mobile
4. Address
5. Location Link (Google Map)
6. Aadhaar No
7. PAN No (voter id)
8. Loan Amount
9. Duration (Days)
10. Document charges (in %, default it will be 2%)
11. Rate of Interest
12. Auto-populate (Total Amount, Each Days Collection Amount)
13. Sales person

Once a loan account is created an OTP should be sent to the client for mobile number verification.

**Loan Management**

This loan management will show all the loans and whom the loan is handling by.

**Report**

Admin can view the reports based on

* 1. Date-wise
  2. Collection Agent Wise
  3. Client-wise
  4. Pending Client’s payment
  5. All the above cumulative reports can also be generated.

**Employee Panel**

**Dashboard**

Employee can view the

1. Today’s List of Clients
2. Unpaid Client’s List

On clicking it will redirect to their relevant pages and shows the list of clients. Once the payment is collected they will click received and it will be updated to the database SMS and Email will be sent to the client.

**Reports**

Employee can also view the reports limited to their client

**Client Panel**

The client can view the loan details and the list of payment that they have made so far.