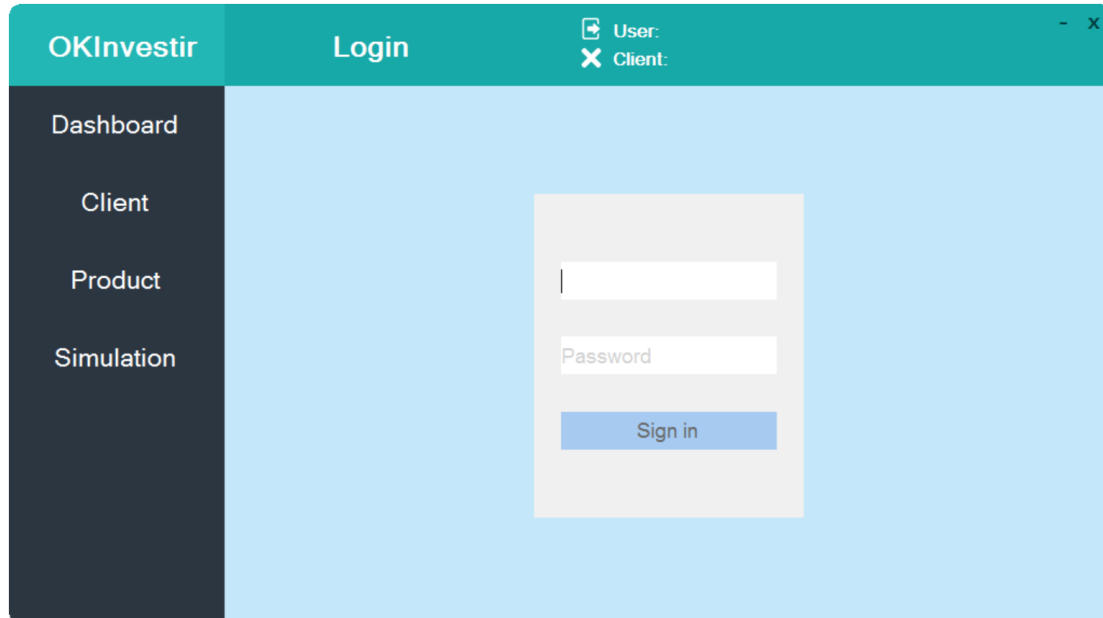


## OKInvestir Manual

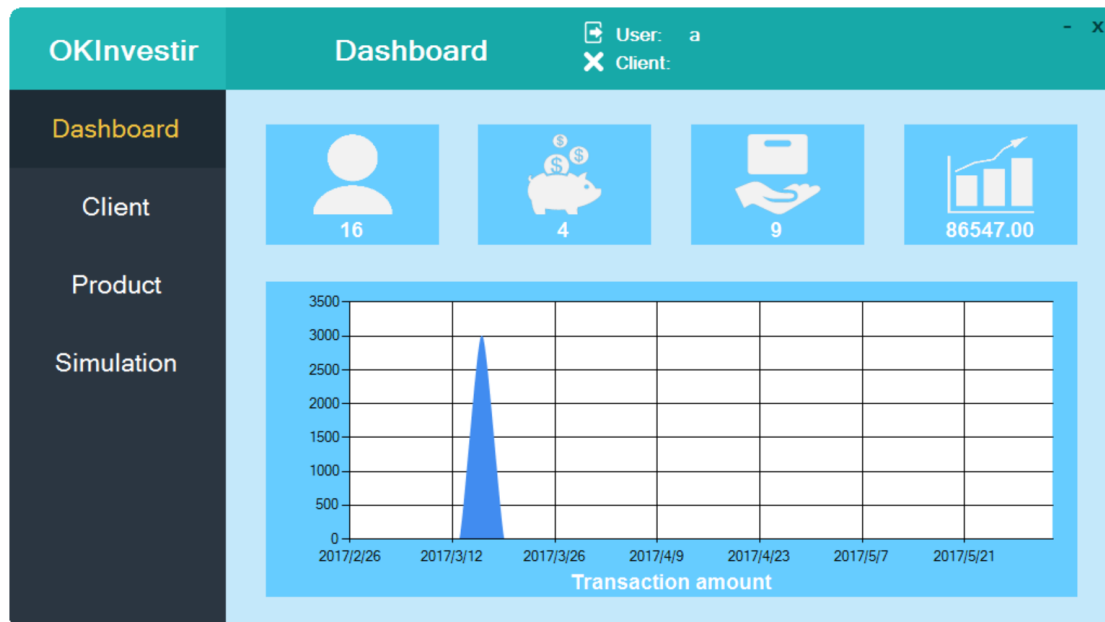
HE Junyang – SONG Yuzhou

Login page:



Enter your login and password.

Dashboard:



It shows global situation of the application.

Such as total number of users, number of available products, number of product sold, turnover and a chart of transaction history.

Client page:

The screenshot shows the OKInvestir Client page. The top bar is teal with the OKInvestir logo, the title 'Client', and user information: 'User: a' and 'Client: clt 1'. The left sidebar is dark blue with navigation links: 'Dashboard', 'Client' (highlighted), 'Product', and 'Simulation'. The main content area is light blue and divided into three columns: 'Clients', 'Bought products', and 'Product detail'. The 'Clients' column has a search bar and a list of clients with columns 'ClientFirstName' and 'ClientLast'. The 'Bought products' column has a list of products with columns 'pdt3', 'pdt4', and 'First Product'. The 'Product detail' column has a table with columns 'Property' and 'Value'. Below the columns are buttons: 'Choose', 'Add client', and 'Modify'. At the bottom, there is a section for 'clt 1' with fields for 'Client ID', 'ID card number', and 'Balance'.

Property	Value
Name	pdt3
Description	d3
Price	20000.00
Final interest	5.00
Start date	03/11/2017
End date	03/11/2019
Buying date	11/02/2017
Status	1

Client ID	ID card number	Balance
2	000000000001	99.00

It shows the list of client registered.

You can search a client by his name. Click on a client's name to consult his information such as ID, card number, balance and bought product list. Click on a bought product to show its details.

You can click on Add Client to create a new client.

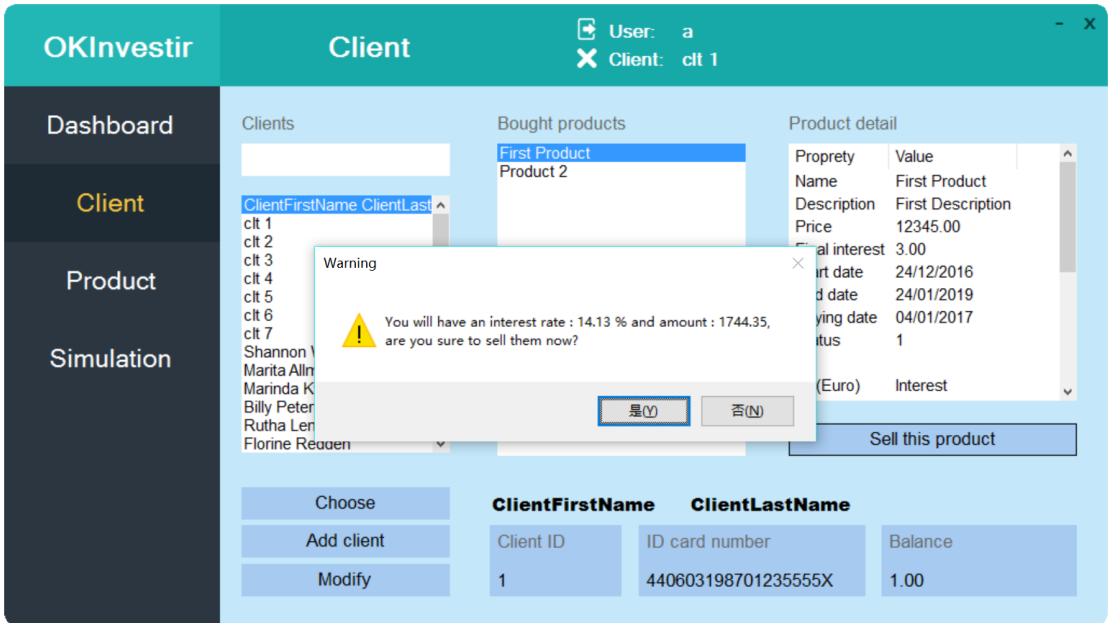
The screenshot shows the OKInvestir Client page with the 'Add Client' form. The top bar is teal with the OKInvestir logo, the title 'Client', and user information: 'User: a' and 'Client: clt 1'. The left sidebar is dark blue with navigation links: 'Dashboard', 'Client' (highlighted), 'Product', and 'Simulation'. The main content area is light blue and divided into three columns: 'Clients', 'Bought products', and 'Product detail'. The 'Clients' column has a search bar and a list of clients with columns 'ClientFirstName' and 'ClientLast'. The 'Bought products' column has a list of products with columns 'pdt3', 'pdt4', and 'First Product'. The 'Product detail' column has a table with columns 'Propr...' and 'Value'. Below the columns are buttons: 'Choose', 'Confirm', and 'Modify'. At the bottom, there is a section for 'clt 1' with fields for 'Client ID', 'ID card number', and 'Balance'. The 'First name' field is highlighted in pink and contains the text 'type name'. The 'Last name' field is highlighted in pink and contains the text 'here'. A red text 'Press Esc to exit.' is visible above the form fields.

Propr...	Value
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Client ID	ID card number	Balance
	123123123	

Click on confirm to save, or press Esc to exit.

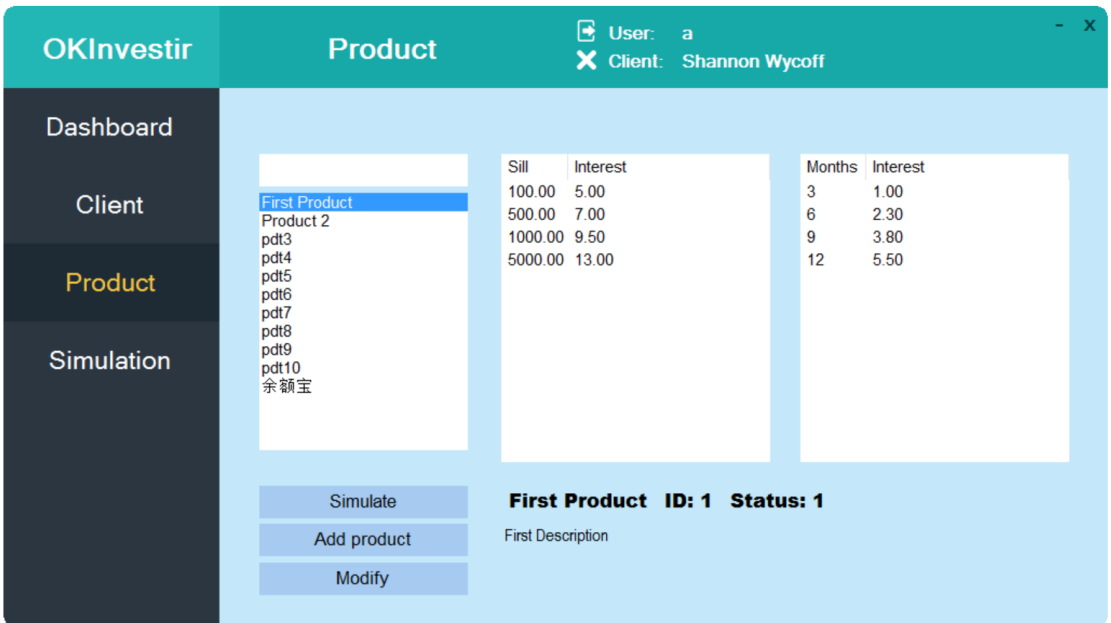
You can select a bought product and click on Sell this product to sell it before the end day of the holding period.



You can click on Choose to select a client for a simulation.  
The header of the application will show the user logged in and the client selected.



Product page:



First column shows the list of product available.  
Second column shows the sill-interest of the selected product.  
Third column shows the time-interest of the select product.

Click on Add product to create a new product or click on Modify to modify the select product.

Create/Modify product page:

OKInvestir Product User: a Client: Shannon Wycoff

Dashboard Client Product Simulation

Name: product name  
Description: product description.....

Add Sill-Interest		Remove	Add Time-Interest		Remove
Sill	Interest(%)		Time in months	Interest(%)	
1000	5		20	8	
2000	8		48	14	

Enter the information of a product  
Each row of the first two columns is the sill-interest information of the product.  
Each row of the next two columns is the time-interest information of the product.  
Click on Save icon to save or click on return icon to abandon modification.

Click on Add Sill-interest or Add Time-interest to add a row.  
Click on remove to remove the last row.

You can click on the Simulate button to go to the simulation page of the selected product.

Simulation page:

OKInvestir Simulation

User: a  
Client: Shannon Wycoff

Dashboard  
Client  
Product  
Simulation

Balance : No account

Start date : 2017年 6月 1日

End date : 2018年 1月28日

Amount : 3000

Simulate

Product selected : First Product

Amount : 3000

Periode : 8 Months

Interest rate : 12.0185 %

Settlement price : 3360.5550

Save

Export all simulation as:

pdf xlsx csv

Select Delete Execute

Enter Start/End date and an amount, and click on Simulate to calculate the result.  
You can change the parameters to simulate again.  
Click on Save button to save the simulation result.

The list of simulation result saved:

First Product - 3000.00 - 8 months
First Product - 8000.00 - 8 months
Product 2 - 600.00 - 15 months

Select Delete Execute

Click on Select to load a save simulation result.  
Click on Delete to remove a simulation.  
Click on Execute to buy the product with the parameter.

You can export the list of simulation result by clicking on the following buttons:

