



## Dashboard Application

User Manual

version 1.0

# Dashboard Application User Manual

Unisoft System Limited

February 05, 2024

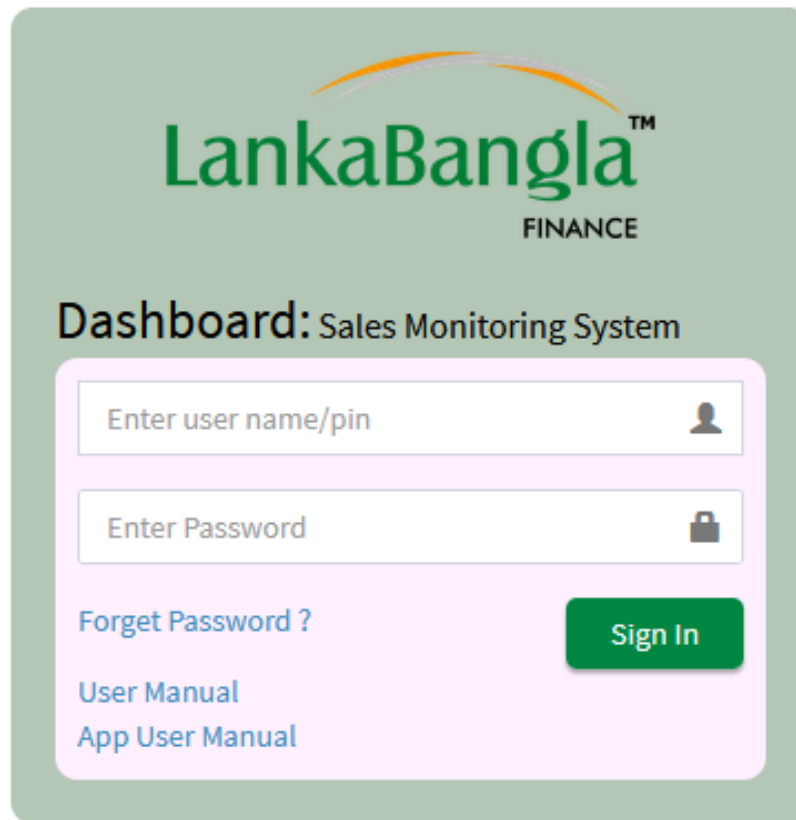
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# 1 Login

## Enter Credential :

To enter the application, the user must input their username and password. The application will determine the appropriate dashboard based on the user's role. A "Submit" button is provided for proceeding.




The login interface for LankaBangla Finance is displayed within a green rounded rectangle. At the top center is the LankaBangla Finance logo, featuring a stylized orange and yellow arc above the text "LankaBangla" in green and "FINANCE" in black. Below the logo, the text "Dashboard: Sales Monitoring System" is shown in black. The login form itself is a light pink rounded rectangle containing two input fields: "Enter user name/pin" with a user icon and "Enter Password" with a lock icon. Below these fields are two links: "Forget Password ?" and "User Manual" (with "App User Manual" below it). A green "Sign In" button is positioned to the right of the links.


Figure 1: Login interface

## 1.1 Forget Password

In the event of a password reset, the user is required to input the email address associated with their account. Subsequently, a login token will be dispatched to the provided email address.




**Dashboard:** Sales Monitoring System



[Back](#)


**User not found**

In case user not found by email address, in such cases, have to contact with the administrator.



**Dashboard:** Sales Monitoring System

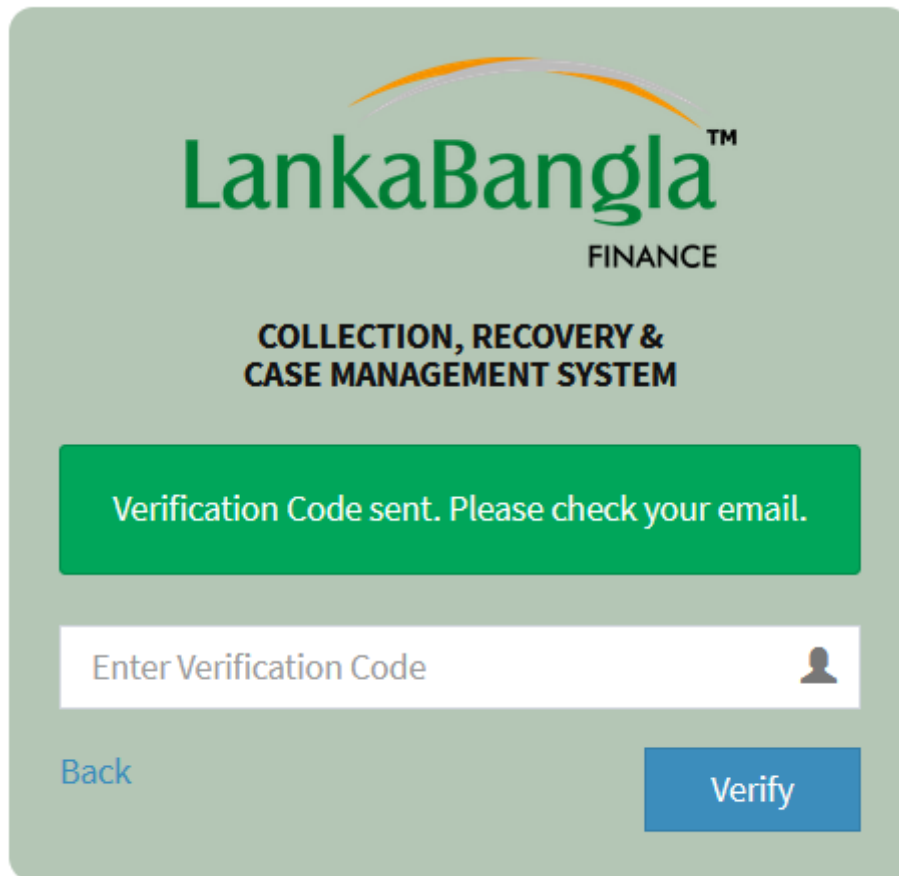
User could not found. Please contact with  
Administrator !



[Back](#)

### Entering the token

When initiating a password reset, a token will be dispatched to the user's email address. Upon receipt of this token, the user is required to enter it into the designated field labeled "Entering the token". Once the token is successfully entered, the system will prompt the user to proceed with the password reset process by displaying the password reset window.



The screenshot shows a mobile application interface for LankaBangla Finance. At the top, the logo features a stylized orange and grey arc above the text "LankaBangla" in green, with "TM" and "FINANCE" below it. Underneath the logo, the text "COLLECTION, RECOVERY & CASE MANAGEMENT SYSTEM" is displayed in bold black capital letters. A prominent green rectangular box in the center contains the white text "Verification Code sent. Please check your email." Below this box is a white input field with the placeholder text "Enter Verification Code" and a small grey user icon on the right. At the bottom left, there is a blue "Back" link, and at the bottom right, there is a blue "Verify" button.

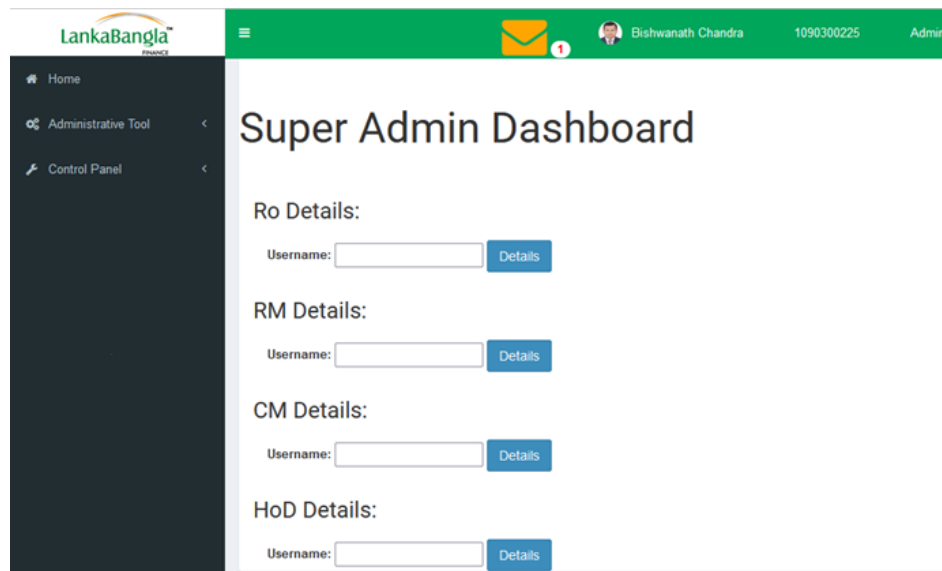
## 1.2 User Manual

User pdf version of user manual will be downloaded.

## 1.3 App User Manual

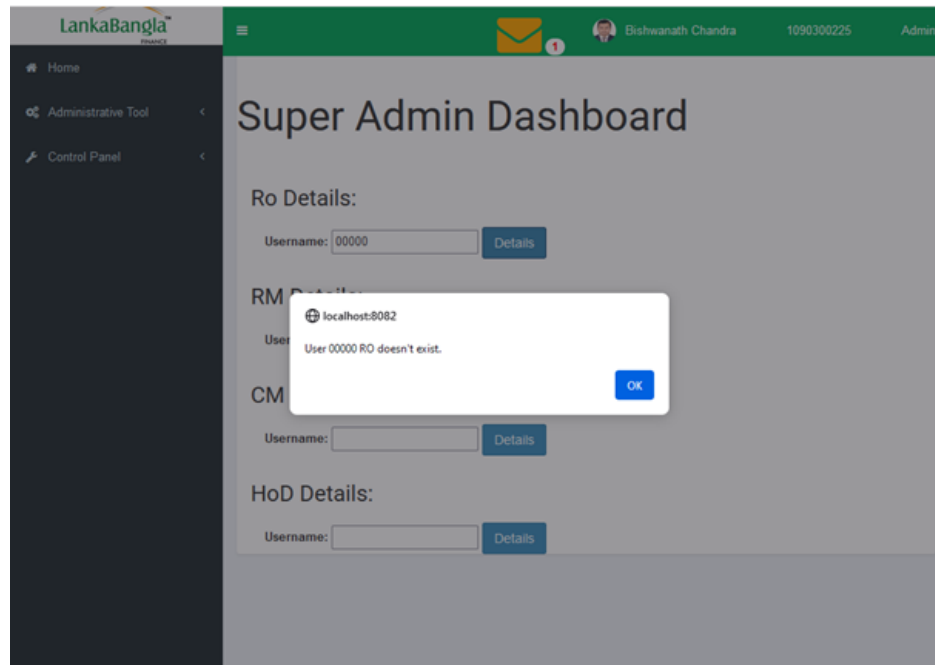
User manual of the mobile app.

## 2 Super Admin



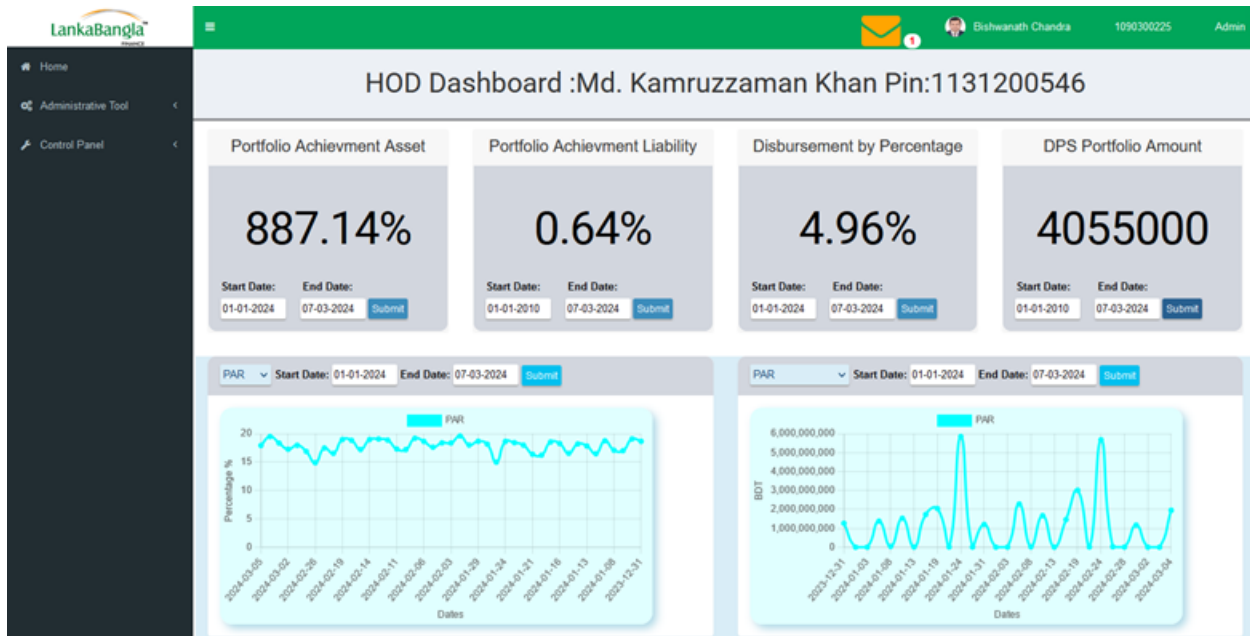
In the Super Admin dashboard, the administrator possesses the capability to access the dashboard of any user within the system. To initiate this process, the Super Admin is prompted to input the username corresponding to the desired user type into the provided field. Upon submission, the system redirects the Super Admin to a new tab containing the dashboard associated with the specified user ID.

### If User not found

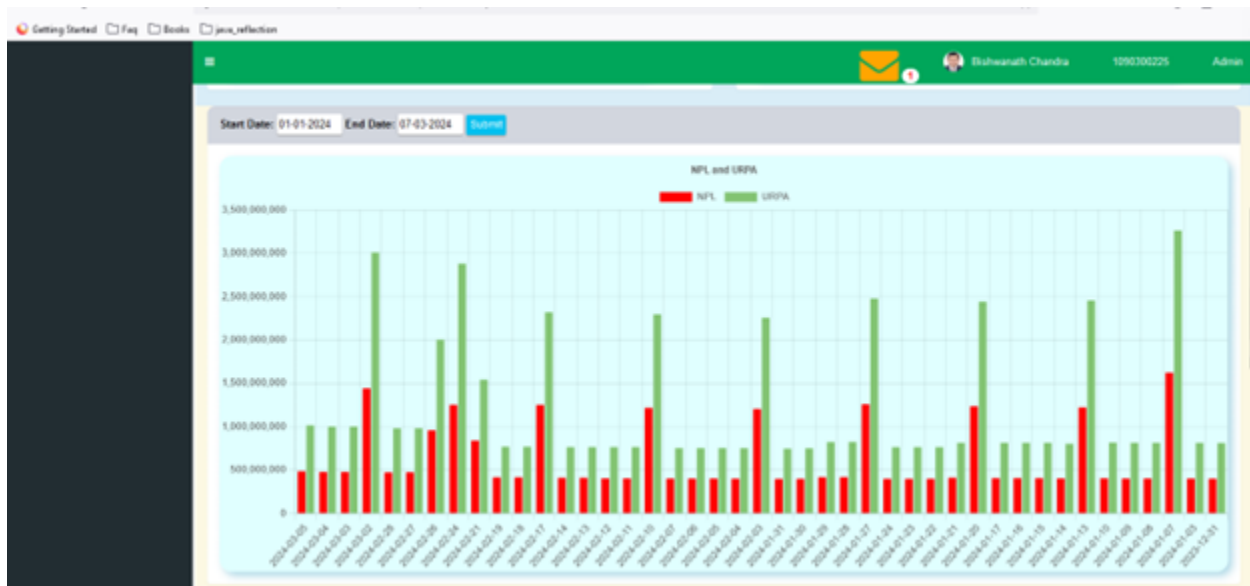


## 3 HoD Dashboard

### HoD view Part 1

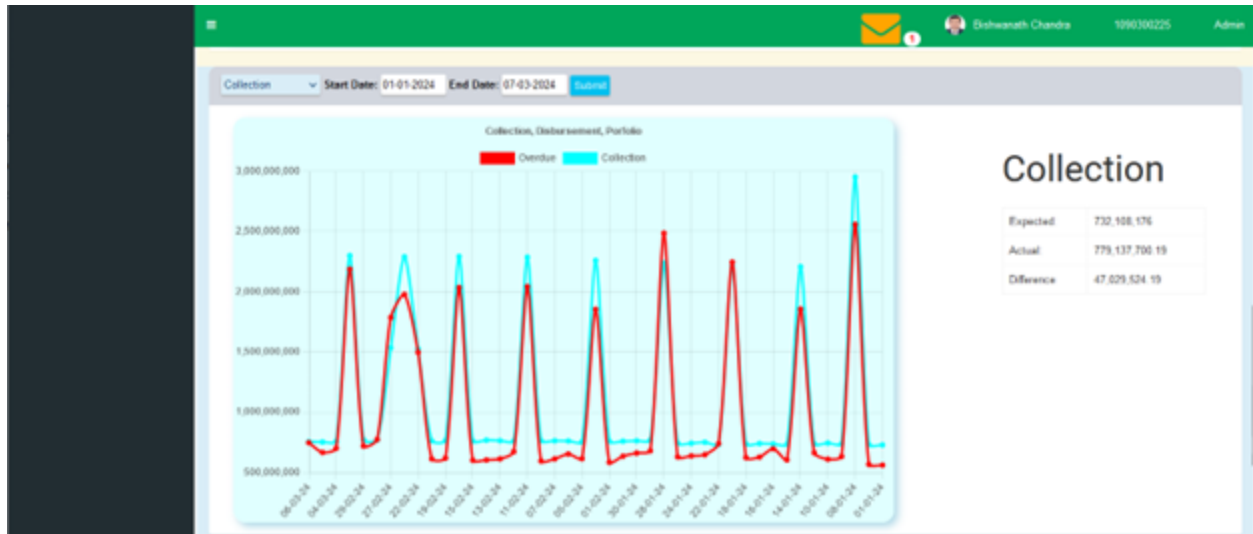


## HoD view Part 2



## HoD view Part 3



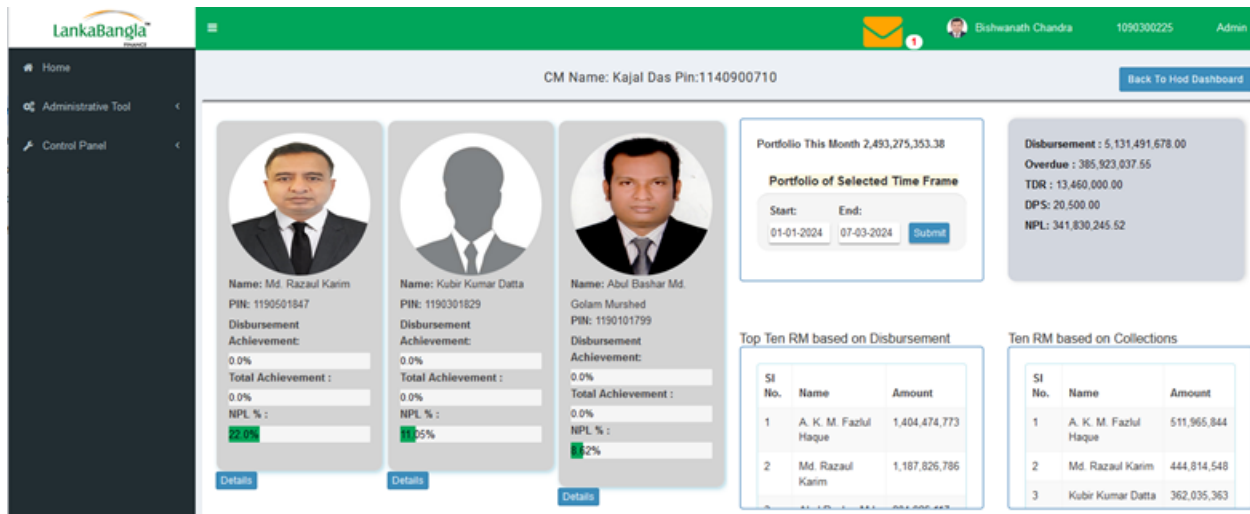


**Team View of the Hod**  
It is the list of CM under a HOD.

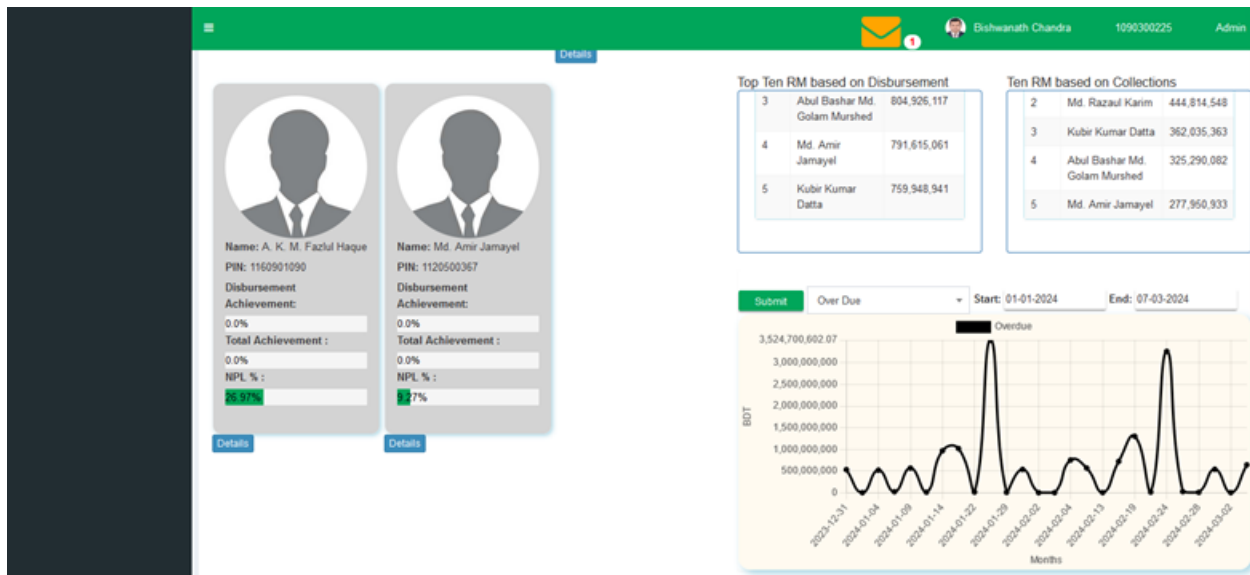


## 4 CM Dashboard

Team view of CM

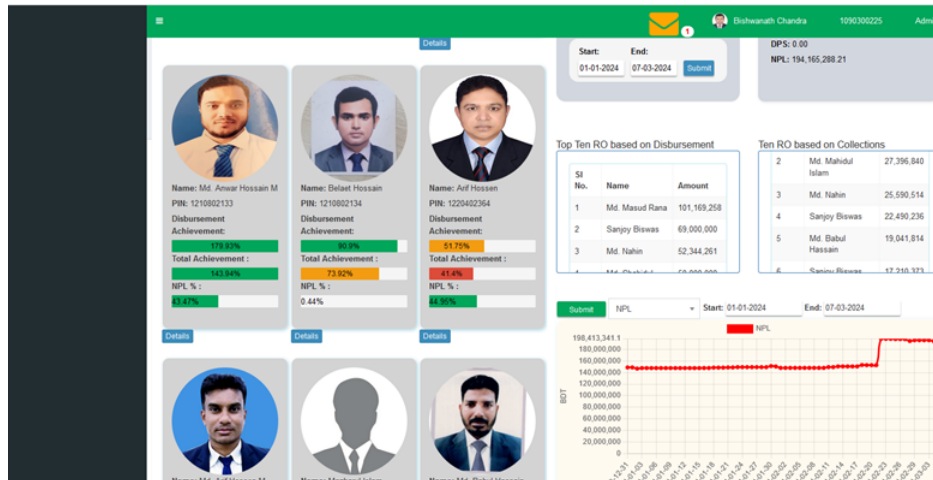


## Historical Data of the RM's



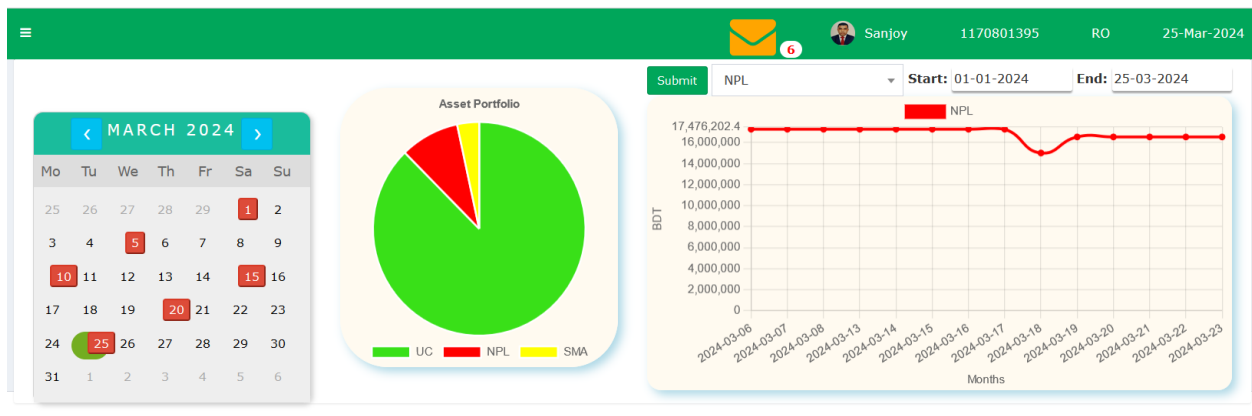
## 5 RM Dashboard

### RM Under the RM



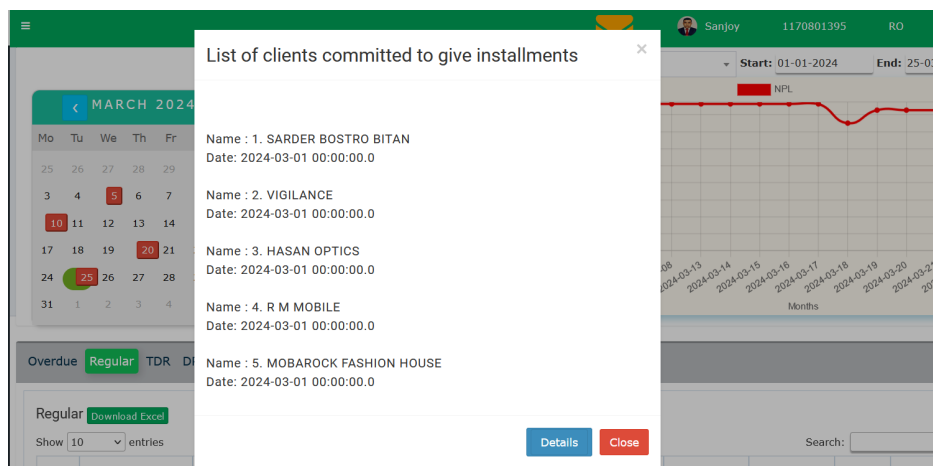
## 6 RO Dashboard

### RO Dashboard Part 1



RO Dashboard : Calender, Asset Portfolio, Graph

### 6.1 Calender






Details of the committed clients

**Description :** The Calendar feature within the software serves as a tool to manage commitments from clients regarding monetary contributions. Dates marked in red signify days where commitments have been made by clients to provide installment payment. Users can interact with these marked dates to view the list of commitments associated with each date. Additionally, users can access detailed information about each commitment through a pop-up window.

**Accessing the Calendar:** Users can access the Calendar feature from the main menu of the software application. Upon selecting the Calendar option, the calendar interface will be displayed, allowing users to view dates and associated commitments.

**Viewing Marked Dates:** Within the calendar interface, dates with client commitments are visually highlighted in red to distinguish them from other dates. Users can easily identify these dates by their color.

**Viewing Commitments:** To view commitments associated with a marked date, users can simply click or tap on the desired date. A pop-up window will appear displaying a list of commitments made by clients for that specific date. Each commitment entry will include relevant details such as client name and date.




Sanjoy
1170801395
RO
25-Mar-2024

Committed Clients Details - 2024-3-20

Overdue

Regular

Overdue

Show 10 entries

Search

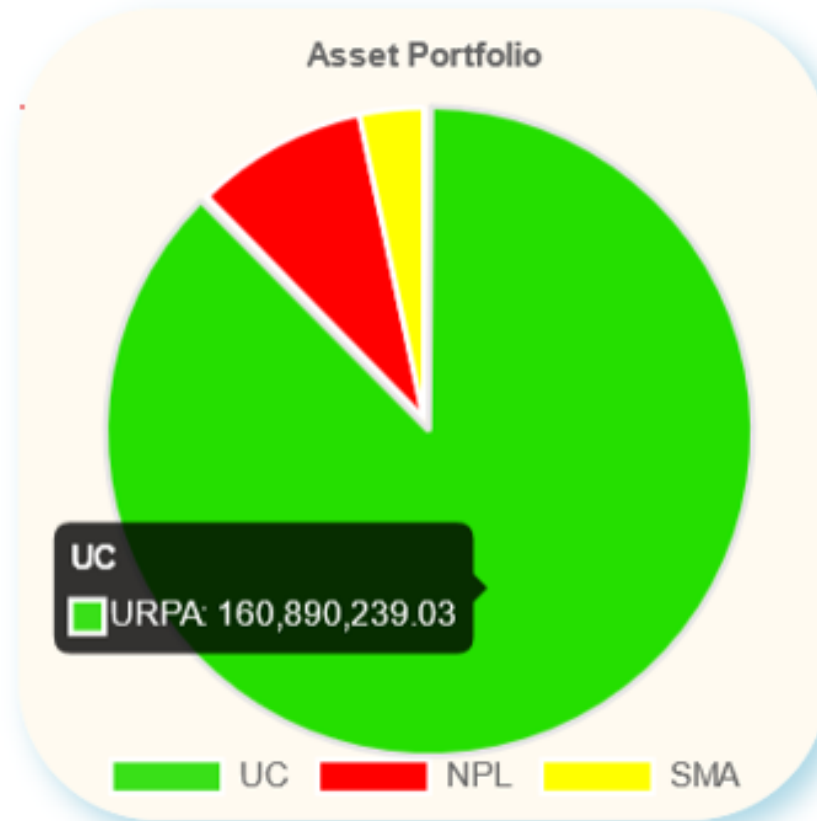
SL.	Account No.	Client Name	Facility Amount	Installment Size	URPA	Total EMI	Paid EMI	MOD	Overdue Amount	CL Status	Payment Date
1	001677500000433	M/S FAKIR TRADERS	3,500,000.00	164,125.00	1,527,167.89	2,780,155.00	2,414,788.35	2.23	365,366.65	SS	29-02-2024
2	001677500000434	MA STORE	2,000,000.00	77,205.00	971,293.07	1,306,005.00	1,301,492.39	0.06	4,512.61	UC	29-02-2024
3	001662800000019	AYMAN HONDA	3,500,000.00	156,705.00	1,381,841.86	2,350,575.00	2,350,700.00	0.00	-125.00	UC	04-03-2024
4	001662800000001	SOHEL THAI ALLUMINIUM WORKS	4,500,000.00	163,944.00	2,061,368.75	2,787,048.00	2,787,048.00	0.00	0.00	UC	29-02-2024
5	001677500000433	M/S FAKIR TRADERS	3,500,000.00	164,125.00	1,527,167.89	2,780,155.00	2,414,788.35	2.23	365,366.65	SMA	29-02-2024
6	001675800000001	M/S LAXMI ENTERPRISE	3,500,000.00	125,138.00	2,531,821.95	2,627,898.00	1,251,380.00	11.00	1,376,518.00	SS	29-02-2024

Showing 1 to 6 of 6 entries

Previous
1
Next

Details of the committed clients

## 6.2 Asset Portfolio



Asset Portfolio

## 6.3 Graph

**Introduction** The Data Visualization Tool is designed to provide users with a comprehensive view of various segments within a dataset. Through this tool, users can analyze data trends over specific periods, allowing for informed decision-making. The tool offers a graphical representation of the data, making it easier for users to interpret and draw insights.

**Dropdown Menu:** The tool provides a dropdown menu with the following options:

- Segment
- Over Due
- Disbursement
- Portfolio
- Collection
- Regular
- UC
- SMA

- NPL
- TDR
- DPS

**Date Selection:** Users can specify a start date and an end date to define the range for data analysis. By default, the start date is set to the beginning of the current year, providing year-to-date data analysis.

**Graphical Representation:** The tool generates graphical representations, such as graphs and charts, to visualize the selected data. This visual aid helps users to identify trends, patterns, and anomalies within the dataset.

## RO Dashboard Part 2

Overdue Regular TDR DPS Collections Disbursement									
Overdue <a href="#">Download Excel</a>									
Show 10 entries		Search: <input type="text"/>							
SL.	Account No.	Client Name	Facility Amount	Installment Size	URPA	Total EMI	Paid EMI	MOD	Overdu Amour
1	001677500000714	M S TAILORS AND BORKA HOUSE	1,000,000.00	48,132.00	1,003,166.66	48,132.00	0.00	1.00	48,1
2	001662800000019	AYMAN HONDA	3,500,000.00	156,705.00	1,381,841.86	2,507,280.00	2,350,700.00	1.00	156,5
3	001662800000024	RADIUM DIAGNOSTIC CENTER & HOSPITAL (PVT)	5,000,000.00	182,160.00	3,285,021.98	2,185,920.00	2,005,406.00	0.99	180,5
4	001677500000676	M/S ALIF ENTERPRISE	500,000.00	23,701.00	475,626.76	71,103.00	47,402.00	1.00	23,7
5	001677500000386	M/S AL-MAMUN ELECTRONICS	1,000,000.00	45,644.00	694,661.46	1,030,740.00	475,600.53	12.00	555,1
6	001677500000405	M/S NUR ENTERPRISE	3,000,000.00	126,770.00	1,011,124.06	2,398,598.00	2,392,746.00	0.05	5,8
7	001666600000075	M/S SKYTECH AGRO PHARMA	2,500,000.00	-	372,468.34	2,554,497.12	2,228,445.00	1.53	326,0
8	001675800000001	M/S LAXMI ENTERPRISE	3,500,000.00	125,138.00	2,531,821.95	2,753,036.00	1,251,380.00	12.00	1,501,6
9	001677600000016	GLASS SOLUTION	2,200,000.00	95,535.00	1,032,096.27	1,241,955.00	1,241,937.00	1.00	
10	001677500000444	I P TEX EXCLUSIVE COLLECTION	700,000.00	32,837.00	536,107.55	556,330.00	261,230.00	8.99	295,1
Showing 1 to 10 of 46 entries									
Previous 1 2 3 4 5 Next									

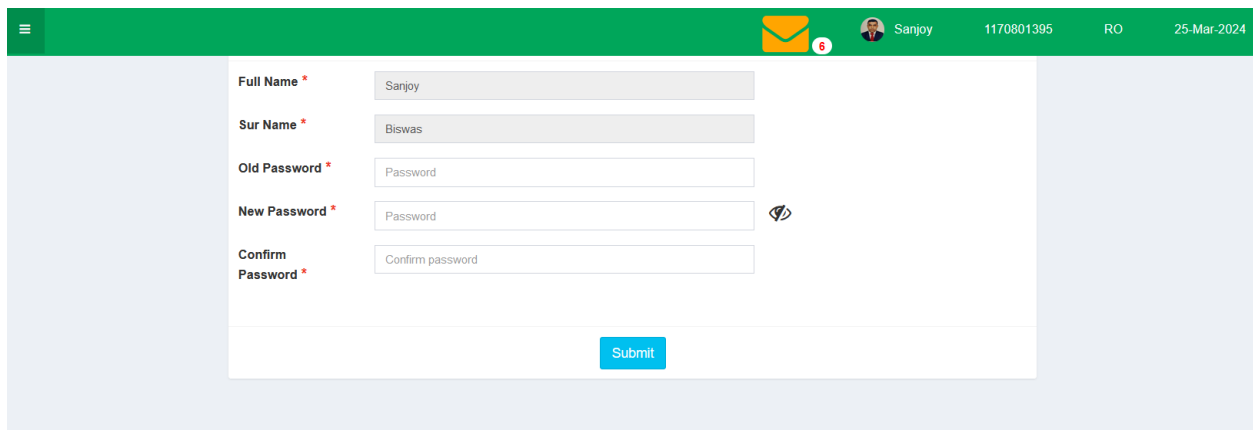
## Download

Clicking on the download button, current tab data will be downloaded in Excel format.

overdue_report_ro(14).xlsx - LibreOffice Calc										
File Edit View Insert Format Styles Sheet Data Tools Window Help										
Liberation Sans 10 pt B I U										
B4 RADIUM DIAGNOSTIC CENTER & HOSPITAL (PVT)										
ACCOUNT_NO	ACCOUNT_NAME	FACILITY_AMOUNT	INSTALLMENT_AMOUNT	URPA	TOTAL_EMI_DUE	TOTAL_EMI_PAID	MOD	OVERDUE_AMOUNT	CL_STATUS	PAYMENT_DATE
001677500000714	M S TAILORS AND BORKA HOUSE	1000000	48132	1003166.66	48132	0	1	48132	UC	2024-02-29 00:00:00
001662800000019	AYMAN HONDA	3500000	156705	1381841.86	2507280	2350700	1	156580	UC	2024-03-04 00:00:00
001662800000024	RADIUM DIAGNOSTIC CENTER & HOSPITAL (PVT)	5000000	182160	3285021.98	2185920	2005406	0.99	180514	UC	2024-02-29 00:00:00
001677500000676	M/S ALIF ENTERPRISE	500000	23701	475626.76	71103	47402	1	23701	UC	2024-02-29 00:00:00
001677500000386	M/S AL-MAMUN ELECTRONICS	1000000	45644	694661.46	1030740	475600.53	12	555139.47	SS	2024-02-29 00:00:00
001677500000405	M/S NUR ENTERPRISE	3000000	126770	1011124.06	2398598	2392746	0.05	5852	UC	2024-02-29 00:00:00
001666600000075	M/S SKYTECH AGRO PHARMA	2500000	-	372468.34	2554497.12	2228445	1.53	326052.12	BL	2023-12-28 00:00:00
001675800000001	M/S LAXMI ENTERPRISE	3500000	125138	2531821.95	2753036	1251380	12	1501656	SS	2024-02-29 00:00:00
001677600000016	GLASS SOLUTION	2200000	95535	1032096.27	1241955	1241937	1	18	UC	2024-03-11 00:00:00
001677500000444	I P TEX EXCLUSIVE COLLECTION	700000	32837	536107.55	556330	261230	8.99	295100	DF	2024-02-29 00:00:00
001677500000447	BHAI BHAI TRADERS	2200000	103201	722618.05	1748450	1743276	0.05	5174	UC	2024-03-19 00:00:00
001677800000016	HAZRAT SHAHJALAL (R) POULTRY AND MEDICINE	4000000	-	2447825.71	4519053.31	2380945.45	11.36	2138107.86	DF	2024-02-29 00:00:00
001677500000433	M/S FAKIR TRADERS	3500000	164125	1527167.89	2944280	2414788.35	3.23	529491.65	SS	2024-02-29 00:00:00
001677500000434	MA STORE	2000000	77205	894736.07	1383210	1378049.39	0.07	5160.61	UC	2024-03-21 00:00:00
001675800000011	SHUVECCA MOBILE ELECTRONICS	700000	30867	244231.15	524739	493875	1	30864	UC	2024-02-29 00:00:00
001677500000276	FATHER FISH AND POULTRY FEED	1196853	-	846696.96	1408238.7	700689.43	15.08	707549.27	BL	2024-02-29 00:00:00
001677500000277	RIPON AUTO HOUSE	882639	49597	369441.17	795603	600000	3.94	195603	SMA	2024-02-29 00:00:00
001677500000281	M/S NIROB POULTRY AND FISH FEED	2662925	-	3389965.22	2992154.31	159446.16	13.98	2832708.15	BL	2024-01-22 00:00:00
001677500000316	DEBNATH AUTO PARTS	1379862	-	1653594.79	1569013.63	40779.11	18.47	1528234.52	BL	2023-05-31 00:00:00
001677500000456	TILES GALLERY	3500000	135143	2214508	2152936	1770491.25	2.83	382444.75	SMA	2024-03-18 00:00:00
001677500000464	MAIMONA BORKA HOUSE	1000000	46929	373362.16	748296	745820	0.05	2476	UC	2024-03-10 00:00:00
001677500000471	M/S MINAR ENTERPRISE	1200000	-	527847.5	1292128.9	806620.28	5.63	485508.62	SS	2024-03-04 00:00:00
001677500000477	HAMIM GARMENTS	1300000	79097	402410.05	1104404	1023200	1.03	81204	UC	2024-02-29 00:00:00
001677500000253	J S COLLECTION	944361	-	750748.86	988495.91	483028.42	1.8	505467.49	DF	2024-02-29 00:00:00
001677800000026	M/S HOLY ENTERPRISE	9000000	346430	2110182.12	6283488	826807.2	0.04	15416	UC	2024-03-04 00:00:00
001677500000632	M/S KAMAL CLOTH STORE	1500000	70681	1250788.06	424086	353702	1	70384	UC	2024-02-29 00:00:00
001677500000511	M/S BISMILLAH STORE	1500000	70460	884578.75	842232	789162	1.04	73070	UC	2024-03-11 00:00:00
001677500000531	FARHANA STORE	800000	42350	412208.81	464074	462594	0.03	1480	UC	2024-02-29 00:00:00
001677500000534	BULBUL SHOES	1000000	46895	587059.21	514623	512702.24	0.04	1920.76	UC	2024-02-29 00:00:00
001677500000535	BISMILLAH GARMENTS	800000	42350	412373.34	464074	462594	0.03	1480	UC	2024-02-29 00:00:00
001677500000501	M/S AL MADINA SHADEE RITAN	1500000	79601	802812.96	617070	760755	7.09	147724	SMA	2024-03-07 00:00:00
overdue_report_ro										
Sheet 1 of 1 PageState:overdue_report_ro English (USA) Average: Sum: 0 100%										

Sample of the excel

## 7 Change Password

The screenshot shows a web dashboard with a green header. On the left is a hamburger menu icon. On the right of the header are a mail icon with a red '6' badge, a user profile for 'Sanjoy', the ID '1170801395', the role 'RO', and the date '25-Mar-2024'. The main content area contains a 'Change Password' form. The form has five input fields: 'Full Name \*' with the value 'Sanjoy', 'Sur Name \*' with the value 'Biswas', 'Old Password \*' with the placeholder 'Password', 'New Password \*' with the placeholder 'Password' and a toggle icon, and 'Confirm Password \*' with the placeholder 'Confirm password'. A blue 'Submit' button is at the bottom right of the form.

### Change Password

#### Change Password

##### Enter Old Password:

In the designated field, enter your current or old password. This serves as a security measure to verify your identity and ensure that only authorized users can change their passwords.

##### Enter New Password:

In the provided text field, enter your desired new password. Ensure that your new password meets any specified requirements regarding length, complexity, and special characters.

##### Confirm New Password:

To confirm the new password, re-enter it in the designated "Confirm Password" field. This step helps prevent typos and ensures that the new password matches the intended one.

##### Password Matching Verification:

As you type the new password and confirm it, the system automatically checks whether the two entries match. If they do not match, an error message should be displayed, indicating that the passwords do not match.

##### Activate Submit Button:

The "Submit" or "Save Changes" button will only be activated once the new password and confirm password fields match. This prevents users from submitting mismatched passwords accidentally.