

Comments

General

- Reference: Process map/steps in Powerpoint
- Stakeholders: Mtaji / Partner / Customer (1. Customer borrow money from partner. 2. Partner borrow money from Mtaji and lends money to Customer. 3. Mtaji lends money to Partner)
- Mtaji can have many Partners, and each Partner can have many Customers
- System handles only loan transactions between Customer and Partner, NOT between Mtaji and Partner
- All pages should be CRUD
- No UI is provided for creating new Partners

- All input fields can contain placeholder text with more information/help text
- Use pagination on long pages, e.g. showing list of payments, invoices etc.
- All changes (updates) to any field should be logged with timestamp, userid, from value (old), to value (new)

Roles and Access

- All Access and Functionality is based on User Roles.
- One role only per user
- Five different roles: Customer, Partner, Mtaji Local Admin, Mtaji Local Credit, Mtaji Global Credit

Users

- Role Mtaji Global Credit can Create, Read, Update users
- Users cannot be deleted, only enabled true/false (false means users does not have access to system)
- Role and Partner (partner_id, for user with role Partner) cannot be updated, only set at user creation
- Role customer cannot be created (can only be created by Partner in flow below)
- Mtaji Dashboard, Actions menu show menu option "User Administration"
- New user will get autogenerated password send by email

1. New Customer Application

- New customer application has a total of 9 status steps. only 5 of those steps are handled by the system (1-3 and 8-9): 1) Account Creation, 2) Upload of Documents, 3) Sign off, 4) Pre-screening, 5) Credit evaluation, 6) Credit Decision, 7) Partner Decision, 8) Document sign, 9) Activate Credit
- Steps, internal system names: 1_CREATE_CUSTOMER, 2_SUBMIT_APPLICATION, 3_PARTNER_APPROVE_APPLICATION, 8_SIGN_LOAN_DOCUMENTS, 9_APPROVE_CREDIT
- Different user roles update different things for each status

1A Partner Register New Customer

- Access: Create: Partner, Read: Partner / Mtaji Local Admin / Mtaji Local Credit / Mtaji Global Credit, Update: None, Delete: None
- Email is sent to customer with login info incl autogenerated password
- Popup to user confirming registration

1B Customer - First Time Registration

- Access: Create: Customer, Read: Customer / Partner / Mtaji Local Admin / Mtaji Local Credit / Mtaji Global Credit, Update: None, Delete: None
- Save to db after each submit (Next/Previous) so user can exit and continue at later stage

1B2 Customer - First Time Registration - Step 2 Financial Info

- Annual Result is calculated
- If No assets is checked, fields to enter assets are hidden
- Company Assets, plus icon (+) adds another row. Plus icon is shown only on last row. (Dropdown, examples: Cars, Properties, Bank accounts, Inventory)
- Company Loans, plus icon (+) adds another row. Plus icon is shown only on last row. (Dropdown, examples: Supplier Loan, Car Loan, Machinery Loan, Property Loan, Inventory Loan, Other)

1B3 Customer - First Time Registration - Step 3 Persons

- Ownership Share is hidden if Role Owner is unchecked
- New Person headline should be Persons name, if filled
- Plus icon (+) next to headline will create a new person form on top of page, already filled out will show under
- Each person can have unlimited number of phone numbers
- Assets, plus icon (+) adds another row. Plus icon is shown only on last row. (Dropdown: Cars, Properties, Bank accounts)

1B4 Customer - First Time Registration - Step 4 Documents

- Preset (hardcoded) documents to be uploaded for Company and each person registered in Step 3

1B5 Customer - First Time Registration - Step 5 Submit

- Popup confirming application submitted
- Email to Partner with cc Mtaji that a new application has been submitted

1C New Customer Application - Sign Off

- Access: Create: Partner, Read: Partner / Mtaji Local Admin / Mtaji Local Credit / Mtaji Global Credit, Update: None, Delete: None

1D New Customer Application - Document Sign

- Access: Create: Partner, Read: Partner / Mtaji Local Admin / Mtaji Local Credit / Mtaji Global Credit, Update: None, Delete: None

1E New Customer Application - Activate Credit

- Access: Create: Mtaji Global Credit, Read: Partner / Mtaji Local Admin / Mtaji Local Credit / Mtaji Global Credit, Update: None, Delete: None

2. Customer Dashboard

- Access:Customer

2A Customer - Dashboard

- Only approved Customer can see Customer Dashboard
- Click contact is a simple mailto-link that will create a blank email in users mailprogram with email address to partner prefilled
- Technical note: Conssider if same page as 3 Partner Dashboard / 4 Mtaji Dashboard

3. Partner Dashboard

- Access: Partner

3B Partner Future Payments / Payment History

- Future payments = installments aggregated (total amount) per day
- Future: future installment dates including today
- History: installment dates before today
- On installment, if there is a comment, show red flag icon. Clicking it will bring up comment in modal dialog.
- (For role Mtaji Global Credit, show edit icon if no red flag, will bring up same modal but with empty comment field. This role can always edit comment. Remember to write to log)

3D Register Customer Sales Invoice (Sales - daily)

- Copy From Excel button will bring up a text field in modal, that will allow user to copy and paste infoblock from Excel. Text will be parsed to autofill fields on form. Exact format TBD.
- Field validation: Installment total amount must be same as Invoice Amount

3E Register Customer Payment (Payments - Weekly)

- Account is hardcoded list (save as text to db)
- Installments should be sorted in date order first, invoice number second
- When Payment Amount is filled, prefill Installment Payments starting from top. Example Payment Amount is 500 TZS. Installments are 300 TZS each, prefill top installment with 300 TZS and second with 200 TZS. Input validation to check total amounts.

4. Mtaji Dashboard

- Mtaji (Mtaji Local Admin / Mtaji Local Credit / Mtaji Global Credit)
- Dashboard pages are the same as for Partner Dashboard, only difference is dropdown in header to select Partner and headline.

4D Mtaji - Temporary Close Credit (Soft Close)

- Access: Mtaji Local Credit / Mtaji Global Credit
- Confirming will set db openCredit = 0, approvedCredit will remain unchanged
- Write action to log_creditlimit

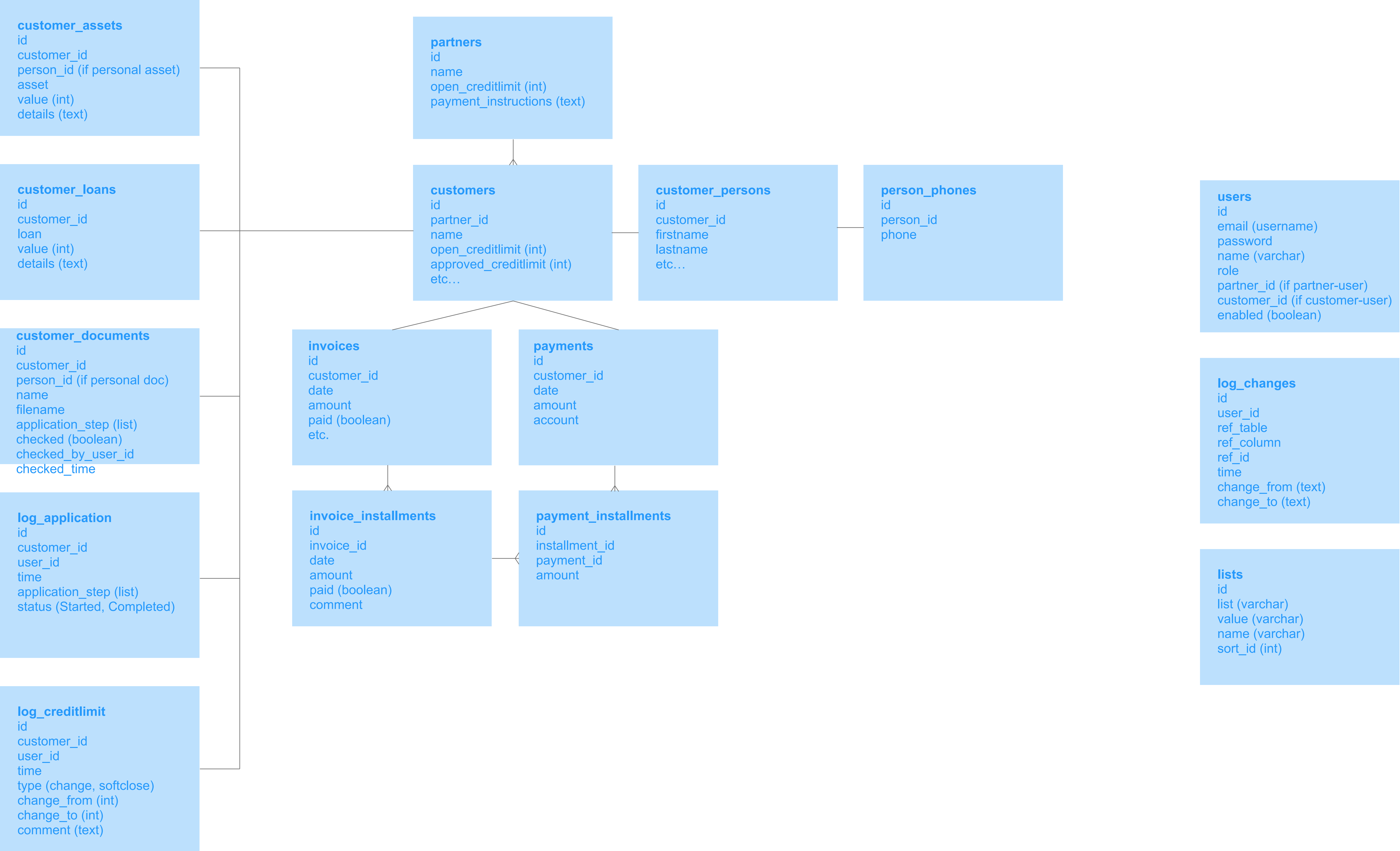
4E Mtaji - Change Credit

- Access: Mtaji Global Credit
- Show Credit Limit Log button will show credit log (log_ceditlimit) in modal window
- Write action to log_creditlimit

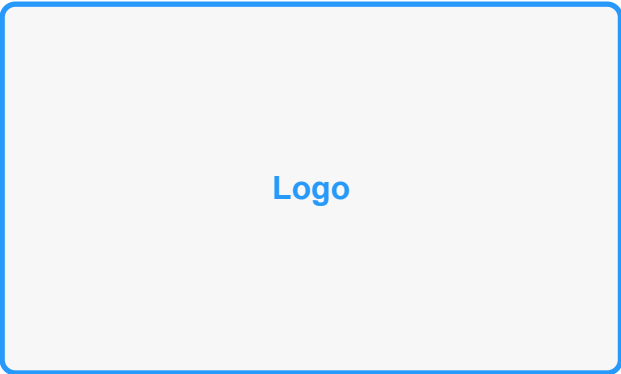
5. Customer Overview

- Access: Customer, Partner and Mtaji (Mtaji Local Admin / Mtaji Local Credit / Mtaji Global Credit)
- Action/Navigation buttons show only for active customer (customer application process done) and depending on user role:
Customer: No buttons
Partner and Mtaji (Mtaji Local Admin / Mtaji Local Credit / Mtaji Global Credit): Show Change Log
Partner: Register Customer Sales Invoice, Register Customer Payment
Mtaji Local Credit / Mtaji Global Credit: Temporary Close of Credit (Soft Close)
Mtaji Global Credit: Change Credit
- User access to different tabs: See 1. New user, for who has access + which screens to show
- Customer will only see tabs with access. Other roles will se all tabs but tabs without access is disabled (cannot view).
- Edit button is only shown to users who can update. Note that Mtaji roles (Mtaji Local Admin / Mtaji Local Credit / Mtaji Global Credit) should always be able to edit
- Show Change Log button will open up modal showing change log for customer, with latest entry on top

DB Structure



Login



Email

Password

[Forgot password?](#)

☐ Keep me logged in

Customer

Welcome ABC Reseller Inc

CONTACT

Next Payment

Due Date	15 April 2020
Amount	930 TZS

Credit Limit

Total	10.000 TZS
Used	5.300 TZS
Remaining	4.700 TZS

Future Payments

Payment History

Invoices

Date	Amount
02 Apr 2020	35 456
09 Apr 2020	45 489
16 Apr 2020	39 012

Partner

Actions:

Register New Customer

Upload Bank Statement

Welcome Acme Partner Inc

Partner Credit Limit	
Total	500.000 TZS
Used	375.000 TZS
Remaining	125.000 TZS

All Customers

GO TO CUSTOMER DETAILS

Overview

Time Period

Future Payments

Payment History

Invoices

Date	Amount
<div><div>−</div>02 Apr 2020</div>	35 456
<div><div><div><div>+</div>ABC Reseller Inc</div><div>10 000</div></div></div>	
<div><div><div><div>+</div>DEF Reseller Inc</div><div>10 000</div></div></div>	
<div><div><div><div>−</div>GHI Reseller Inc</div><div>15 456</div></div></div>	
<div><div><div>Invoice 23456</div><div>10 000</div></div></div>	
<div><div><div><div><div>🔥</div>Invoice 34567</div><div>5 456</div></div></div></div>	
<div><div><div>+</div>09 Apr 2020</div></div>	45 489
<div><div><div>+</div>16 Apr 2020</div></div>	39 012

Welcome Acme Partner Inc

Partner Credit Limit	
Total	500.000 TZS
Used	375.000 TZS
Remaining	125.000 TZS

<div>All Customers</div> <div>GO TO CUSTOMER DETAILS</div>				
Overview				
<div>Time Period</div>				
<div>Future Payments</div> <div>Payment History</div> <div>Invoices</div>				
Invoice	Date	Customer	Amount	Remaining
23456	02 Apr 2020	ABC Retail Inc	15 456	0
34567	03 Apr 2020	XYZ Retail Inc	5 489	489
45678	03 Apr 2020	ABC Retail Inc	9 012	312

Register Customer Sales Invoice (Sales - Daily)

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COPY FROM EXCEL

Customer *

ABC Reseller Inc



Invoice Date *

20 Mar 2020



Amount TZS *

2345.67

Invoice Number *

2345

Installments *

Date

Amount

Date of instalment



TZS



Documents

Invoice *

Upload...

Excel form *

Upload...

SAVE

Register Customer Payment (Payments - Weekly)

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Customer *

ABC Reseller Inc

Payment Date *

20 Mar 2020

Amount TZS *

500.00

Account *

Cash

Installments *

Date	Invoice	Remaining	Paid
30 Apr 2020	23456	300 TZS	300
30 May 2020	23456	300 TZS	200
30 Jun 2020	23456	300 TZS	TZS
30 Jul 2020	23456	300 TZS	TZS
30 Aug 2020	23456	234 TZS	TZS

SAVE

Upload Bank Statement (Weekly Clearance)

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Bank Statement *

Upload...

SAVE

Selected Partner: Acme Partner Inc

Partner Credit Limit	
Total	500.000 TZS
Used	375.000 TZS
Remaining	125.000 TZS

All Customers

GO TO CUSTOMER DETAILS

Overview

Time Period

Future Payments

Payment History

Invoices

Date	Amount
<div><div>-</div>02 Apr 2020</div>	35 456
<div><div><div><div><div>+</div>ABC Reseller Inc</div><div>10 000</div></div><div><div><div>+</div>DEF Reseller Inc</div><div>10 000</div></div><div><div><div>-</div>GHI Reseller Inc</div><div>15 456</div></div><div><div><div><div><div><div><div></div><div>Invoice 23456</div></div><div>10 000</div></div><div><div><div><div></div><div>Invoice 34567</div></div><div>5 456</div></div></div></div></div></div></div></div></div>	
<div><div><div>+</div>09 Apr 2020</div></div>	45 489
<div><div><div>+</div>16 Apr 2020</div></div>	39 012

ABC Reseller Inc – Temporary Close Credit

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CONFIRM CLOSE OF CREDIT

Mtaji

Logo

Acme Partner Inc



Dashboard

Actions

Actions:

User Administration

Selected Partner: Acme Partner Inc

Partner Credit Limit	
Total	500.000 TZS
Used	375.000 TZS
Remaining	125.000 TZS

<div>All Customers</div> <div>GO TO CUSTOMER DETAILS</div>				
Overview				
<div>Time Period</div>				
<div>Future Payments</div> <div>Payment History</div> <div>Invoices</div>				
Invoice	Date	Customer	Amount	Remaining
23456	02 Apr 2020	ABC Retail Inc	15 456	0
34567	03 Apr 2020	XYZ Retail Inc	5 489	489
45678	03 Apr 2020	ABC Retail Inc	9 012	312

ABC Reseller Inc – Change Credit

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SHOW CREDIT LOG

Customer ABC Reseller Inc

Contact Name Michael Denver

Current Credit 10.000 TZS

New Credit * TZS

Comment * Why was credit line changed?

SAVE

Customer Overview

Customer Overview: ABC Reseller Inc

SHOW CHANGE LOG

REGISTER CUSTOMER SALES INVOICE

REGISTER CUSTOMER PAYMENT

TEMPORARY CLOSE OF CREDIT

CHANGE CREDIT

- Account Creation Partner
- Upload Documents Customer
- Sign Off Partner
- Pre Screening Mtaji
- Credit Evaluation Mtaji
- Credit Decision Mtaji
- Partner Decision Partner
- Document Sign Partner
- Activate Credit Mtaji

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Trading Name	ABC Reseller Inc	Client Since	March 2020
Customer Number	2345	Annual Sales	120.000 TZS
Contact Name	Michael Denver	Last 3 Months	34.000 TZS
Contact Email	michael.denver@email.com	Suggested Credit	20.000 TZS
EDIT			

New Customer Application Process

New Customer – Register (Account Creation)

Account
Creation
Partner

Upload
Documents
Customer

Sign Off
Partner

Pre
Screening
Mtaji

Credit
Evaluation
Mtaji

Credit
Decision
Mtaji

Partner
Decision
Partner

Document
Sign
Partner

Activate
Credit
Mtaji

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Trading Name	ABC Reseller Inc	Client Since	Year	Month
Customer Number	2345	Annual Sales	Enter annual sales in TZS	
Contact Name	Michael Denver	Last 3 Months	Enter last 3 month sales in TZS	
Contact Email	michael.denver@email.com	Suggested Credit	Enter suggested credit line in TZS	
SAVE				

Welcome ABC Reseller Inc

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Step 1 of 5 - Company Info

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Registered Name *	Company Registered Name	City Area *	
Registration Number *	234567890	Street *	
TIN Number *	Tax Payers Identification Number	Block Number	
VAT Number	234567890	Plot Number	
		Company Phone	
		Company Email	
		Homepage	
<div>NEXT STEP ></div>			

Step 2 of 5 – Financial Info

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Suggested Credit	10.000 TZS	Annual Purchases	54.300 TZS
Requested Credit *	<input type="text" value="Requested Credit in TZS"/>	Last 3 Months	8.430 TZS
	Last Year	Current Year (Forecast)	
Annual Sales	<input type="text"/>	<input type="text"/>	
Annual Cost of Goods	<input type="text"/>	<input type="text"/>	
Annual Cost of Staff	<input type="text"/>	<input type="text"/>	
Annual Cost of Other	<input type="text"/>	<input type="text"/>	
Annual Result	10.000 TZS	10.000 TZS	
Company Assets			
<input type="checkbox"/> No assets			
Asset	Value	Details	
<input type="text" value="Select Asset"/>	<input type="text" value="TZS"/>	<input type="text" value="Enter Details About Asset"/> <input type="button" value="X"/> <input type="button" value="+"/>	
Company Loans			
<input type="checkbox"/> No loans			
Loan Type	Current Value	Lender and Details	
<input type="text" value="Select Asset"/>	<input type="text" value="TZS"/>	<input type="text" value="Enter Details About Asset"/> <input type="button" value="X"/> <input type="button" value="+"/>	

Step 3 of 5 – Persons

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New Person



Role *

- ☐ Owner
- ☐ Board Member
- ☐ Manager

Ownership Share *

Ownership in percent

First Name *

Company Registered Name

City Area *

Last Name *

234567890

Street *

National ID *

Tax Payers Identification Number

Block Number

Email *

234567890

Plot Number

Phone Number(s) *

234567890

×

+

In Case of Emergency

Enter emergency contact information

Personal Assets (Cars, Properties, Bank Accounts)

☐ No assets

Asset

Value

Details

Select Asset

▼

TZS

Enter Details About Asset



< GO BACK

NEXT STEP >

Step 4 of 5 – Documents

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Company – ABC Reseller Inc

Registration Form *

Upload...

Registration Form *

Upload...

Registration Form *

Upload...

Michael Denver

Tax Form *

Upload...

Document X*

Upload...

Document X*

Upload...

Person Z

Tax Form *

Upload...

Document X*

Upload...

Document X*

Upload...

< GO BACK

NEXT STEP >

Step 5 of 5 – Submit Application

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☐ I Accept the Terms and Conditions

< GO BACK

SUBMIT

New Customer – Approve Application (Sign Off)

Account Creation Partner

Upload Documents Customer

Sign Off Partner

Pre Screening Mtaji

Credit Evaluation Mtaji

Credit Decision Mtaji

Partner Decision Partner

Document Sign Partner

Activate Credit Mtaji

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Customer

ABC Reseller Inc

Contact Name

Michael Denver

Document Check *

☐ Document X

☐ Document X

☐ Document X

☐ Document X

☐ Document X

☐ Document X

☐ Document X

☐ Document X

☐ Document X

Upload Signed Documents

Signed T&C *

Upload...

Document Y

Upload...

Document Y

Upload...

Comments

Enter any comments

☐ I, the Partner, approve Mtaji Fees according to Terms & Conditions

APPROVE APPLICATION

New Customer – Final Document Signing (Document Sign)

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Mtaji

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Mtaji

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Customer

ABC Reseller Inc

Contact Name

Michael Denver

Company – ABC Reseller Inc

Loan Agreement *

Upload...

Registration Form *

Upload...

Registration Form *

Upload...

Michael Denver

Personal Guarantee *

Upload...

Document X*

Upload...

Document X*

Upload...

Person Z

Personal Guarantee *

Upload...

Document X*

Upload...

Document X*

Upload...

SUBMIT DOCUMENTS

New Customer – Final Credit Line Decision (Activate Credit)

Account
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Partner

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Partner

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Document
Sign
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Activate
Credit
Mtaji

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Customer

ABC Reseller Inc

Contact Name

Michael Denver

Credit

10.000 TZS

ACTIVATE CREDIT LINE