**On list loan/ view loans**

1. Remove credit score on view client loans
2. Remove time seconds on view loans
3. keep standard of fonts like address and a/c number
4. send email should send to customer and SMS
5. From customer view or profile, on add loan button
6. Remove the 2nd Name on the name

**Borrowers**

1. **Adding a New Borrower**
2. Crop Photo.
3. Make sure either passport or ID is captured.
4. There should be a unique Borrower/Customer number
5. List of Borrowers
   * Only Activate Send SMS when the gateway is set
   * Print should filter some of the fields.
   * Deactivate the borrower when delete
   * Export PDF Not Functional on List Borrowers – Critical
   * Change status to Reg. Status

**Actions**

* **View**
  + 1. When clicking add loan from view borrowers, use that customer a/c and name and auto fill the form..
    2. View Borrower Files … Show Document Category then on click, open the files.
    3. On loan table Account, Created On, Created By, when last updated, Loan Status, Amount, move actions to the, account type, balance, balance type, account status – List of all Accounts
    4. Remove Export data and Show/Hide Columns
    5. Change Borrowers Loan Statement to Borrower Statements
* Edit
  + - 1. Add Multiple rows table on Financial information
      2. Add Category/Type of Files while Upload documents. The Upload files per category.
* Download

1. Make sure the download downloads all files uploaded

**Loans**

1. New Loan
   * New Specification for New Loan Page
   * All A loan Slider for the Principal Amount based on the spec
   * On a New Loan, date field should be standard.
   * Remove the Fixed amount cycle and amount
   * Remove Guarantors Passport/Preview
2. View Loan
   * Remove The second names
   * Format Time to remove seconds
   * Remove Credit Score
   * Remove Current Loan Documents from the top section, remove Add Loan, View All Loans.
   * Loan Agent
   * Remove the table on the view all Loans
   * Remove the view all loans button
   * Remove Additional Fees when completing loan
   * Order Should be Terms, Schedule …, Repayments
   * Remove all buttons under loan terms
   * Review the Penalty Settings
   * Be able to Pay While on View Loan without having to fill the details of the customer.
   * Before Disbursement, complete registration and Collateral.
   * You can only approve the loan when all requirements are done.
   * Remove Expenses and add collection fees
   * In the Loans View, Only Leave Download Statement, Email Statement
   * Remove Restructure Loan On
   * Leave Edit Button and Only sure statuses on edit

New Employee

1. Select the branch from all branches

Company Settings

1. Add a new tab, company Scoring to add the scoring company details

Credit Bureau Submissions – Due by Saturday 12pm

1. Table structure: Batch number, count, status (Submitted, Scheduled, Failed), date must be action date, actioned by(Manually and system) then Action (download, view).
2. -Download: Call the service and get back the file then write contents to a .txt file
3. -View, the table showing all loans to be submitted on that specific day.
4. Show a manual submit if the file failed to submit. When clicking the manual submit, call backend to send the file with SFTP/Email details for back end to submit.

Integration be done by Saturday 12pm, testing should be done by COB Friday 3rd.