## Terms of Reference (TOR) for Loan Performance Dashboard Development

## Introduction:

The aim is to enhance loan monitoring and analysis capabilities by developing a comprehensive Loan Performance Dashboard. This dashboard will provide insights into loan disbursement, collection, sales, and performance by individuals/groups.

Additionally, it will facilitate the establishment of attainable goals by leveraging historical loan data and analysis of income status.

Objectives: The main objectives of this project are as follows:

- ✓ Develop a user-friendly Loan Performance Dashboard.
- ✓ Incorporate features to track loan disbursed, collected, sales outreached and performance by individuals/groups.
- ✓ Provide monthly, weekly, and daily analysis of loan progress.
- ✓ Generation of income status.
- ✓ Enable goal-setting based on historical loan data.

Scope of Work: The scope of work includes but is not limited to:

- Gathering of data sources for loan information.
- > Implementation of tracking mechanisms for disbursement, collection, sales and performance.
- Incorporation of filtering options for monthly, weekly, and daily analysis.
- Development of goal-setting functionality based on historical loan data.

**Deliverables**: The project deliverables will be Wireframes of the Loan Performance Dashboard and fully functional Dashboard with tracking and analysis features.

**Timeline**: The estimated timeline for the project is as follows:

2	PROJECT PLAN Objective: Developing Dashboard					22 March	23 March	24 March	25 March	26 March	27 March		29 March	30 March 31 March	1 April	2 April	3 April	4 April	5 April	6 April	7 April	8 April	9 April	10 April	11 April	12 April
3	Action item/Deliverables	Start Date	End Date	Status																						
4	Database Design	21-Mar-24	22-Mar-24	In Progress *	1						П	П	Т	Т	Т	Г							Т	Т	Т	П
5	UI/UX Design	23-Mar-24	26-Mar-24	Not started																						
6	Frontend development	27-Mar-24	2-Apr-24	Not started *																						
7	Backed Development	3-Apr-24	7-Apr-24	Not started *																						
8	Integration	8-Apr-24	11-Apr-24	Not started *																						
9	Test and Deployment	12-Apr-24	12-Apr-24	Not started																						