

Jobastech Loan Management Software (JLMS)

User Guide



INTRODUCTION

This document provides a comprehensive step-by-step guide on how to use the loan management system.

The software was developed with high sought after web development languages.

The sections below provide a step-by-step guide on how to use the core functionalities of the software.

Login to the Software

1. Select Branch Code
2. Enter your user ID and Password
3. Click on Login button

© 2023
- User Login

1 Branch Code

Branch Code

Choose Branch Code

User ID

Enter User ID

Password

Forgot password?

Enter password

Remember me

Log In

2 ID

3 Password

Order of Setup

- ❖ Create Jurisdiction**
- ❖ Create Staff**
- ❖ Create Group**

Setup Approval

- ❖ Click on View Jurisdiction**
- ❖ Click on View Staff**
- ❖ Click on View Group**

Create Jurisdiction

1. Login to your Dashboard
2. Click on Setup
3. Select Jurisdiction
4. Fill up the form shown
5. Click on submit

The image displays two screenshots of the Jobastech Global Ent. dashboard, illustrating the steps to create a jurisdiction.

Top Screenshot: Dashboard Overview

- Header:** Jobastech Global Ent. logo, search bar, user profile (Atansuyi Emmanuel), and navigation icons.
- Dashboard:** A grid of statistics including Total Registered Member (2), Total Active Member (2), Total Inactive Member (0), Total Disbursed Loan (42,000), Total Loan Repayment (3,000), Total Loan Outstanding (39,000), and Total Loan Group (2).
- Left Sidebar:** A list of menu items including Member, Loans, Deposit, Reports, Setup, Add Branch, Add Group, Add Jurisdiction (highlighted with a red box), Staff Privilege, View Branch, View Group, View Jurisdiction, BackUp, and Logout.

Bottom Screenshot: JURISDICTION CREATION FORM

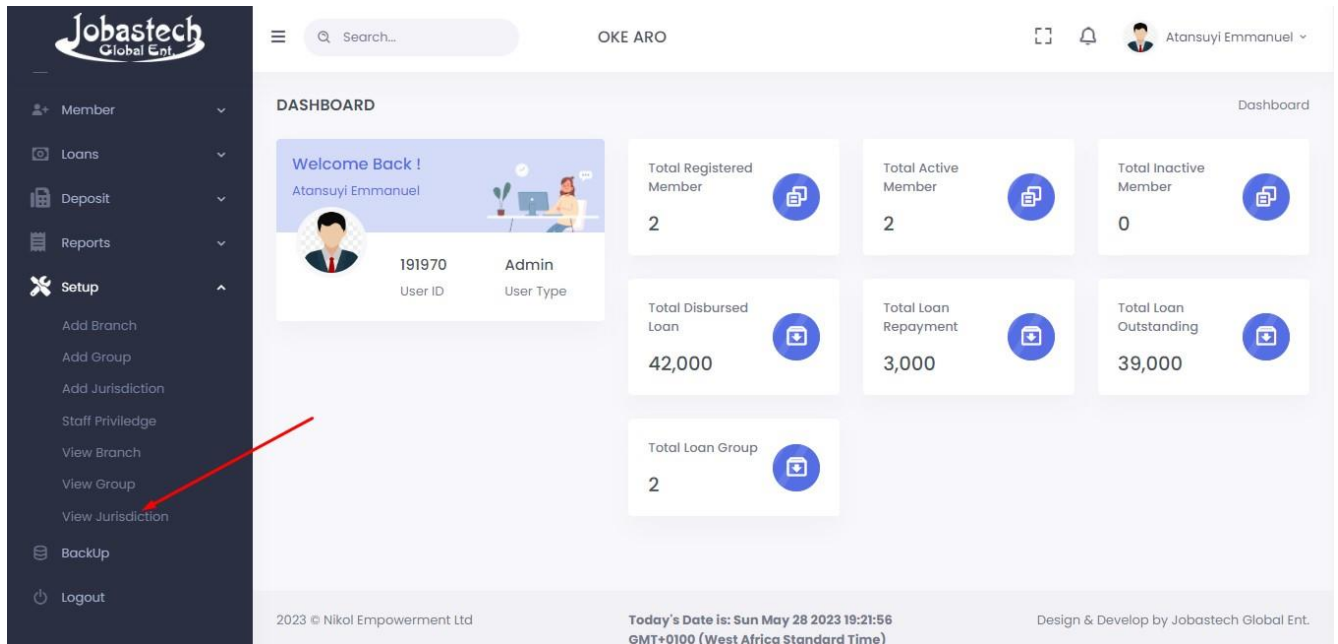
- Header:** Same as the top screenshot.
- Form:** A form titled "JURISDICTION CREATION" with three input fields: "State" (labeled "Enter State"), "LGA" (labeled "Enter LGA"), and "ZONE" (labeled "Enter Zone"). A blue "Submit" button is located below the fields.
- Left Sidebar:** The same menu items as the top screenshot, with "Add Jurisdiction" highlighted.

Red arrows in both screenshots indicate the flow from the "Add Jurisdiction" menu item to the "JURISDICTION CREATION" form and its "Submit" button.

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Jurisdiction Confirmation

1. Click on View Jurisdiction
2. Click on Edit
3. Change the status from Inactive to Active
4. Click Submit
5. Note: You can also update the Group details here too.



Jobastech Global Ent.

Search...

OKE ARO

Atansuyi Emmanuel

DASHBOARD

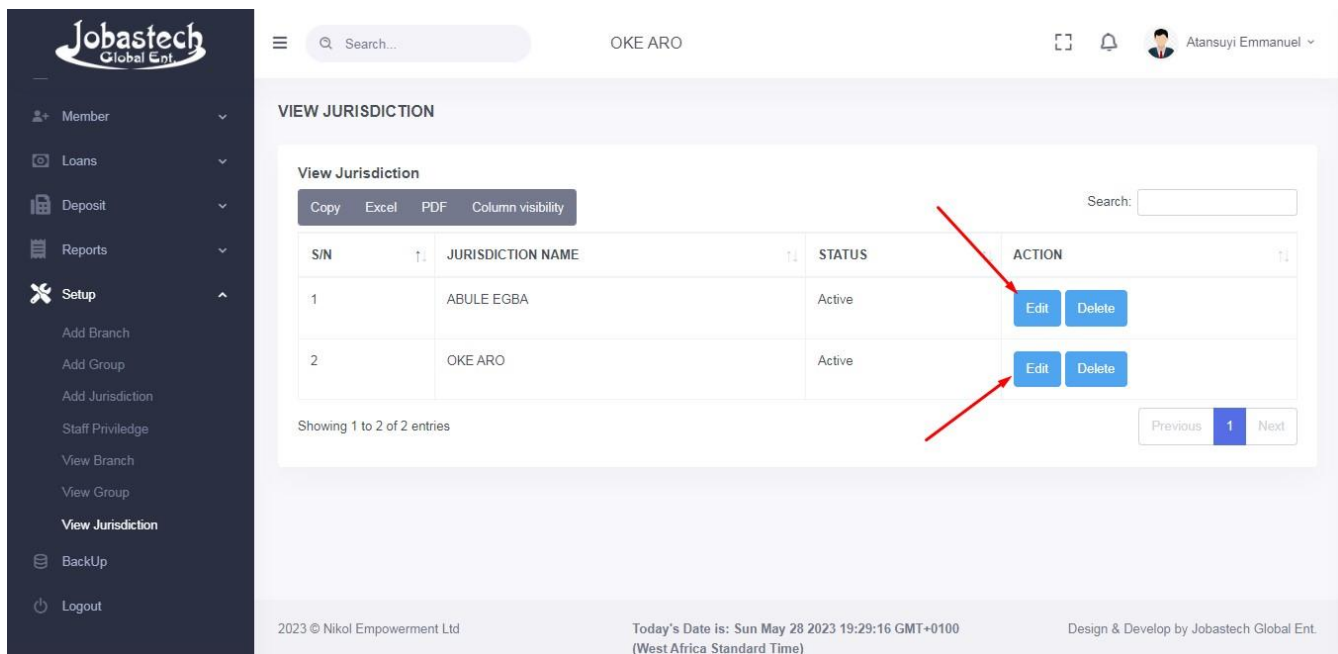
Welcome Back !
Atansuyi Emmanuel
191970 User ID
Admin User Type

Statistic	Value
Total Registered Member	2
Total Active Member	2
Total Inactive Member	0
Total Disbursed Loan	42,000
Total Loan Repayment	3,000
Total Loan Outstanding	39,000
Total Loan Group	2

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Search...

OKE ARO

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VIEW JURISDICTION

View Jurisdiction

Copy Excel PDF Column visibility

Search:

S/N	JURISDICTION NAME	STATUS	ACTION
1	ABULE EGBA	Active	<button>Edit</button> <button>Delete</button>
2	OKE ARO	Active	<button>Edit</button> <button>Delete</button>

Showing 1 to 2 of 2 entries

Previous 1 Next

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Confirm Staff

1. Click on Staff
2. Click on Approve Staff
3. Click on Approve
4. A prompt message will appear, click Ok to approve and Cancel to Reject.

The screenshot displays the Jobastech Global Ent dashboard. The left sidebar menu includes options like Dashboards, Staff, Add Staff, Approve Staff, Edit Staff, Staff List, Member, Loans, Deposit, Reports, Setup, BackUp, and Logout. The 'Approve Staff' option is highlighted with a red arrow. The main content area shows the 'VIEW STAFF' page with a table of staff members. The table has columns for S/N, STAFF NAME, PHONE NUMBER, and ACTION. The 'ACTION' column contains buttons for Details, Approve, and Delete. A red arrow points to the 'Approve' button for the first staff member, YUSUF GABRIEL. The table shows 2 entries, and the pagination indicates 'Showing 1 to 2 of 2 entries'.

S/N	STAFF NAME	PHONE NUMBER	ACTION
1	YUSUF GABRIEL	09028282822	Details Approve Delete
2	AKINSANYA TITIOPE	09022222222	Details Approve Delete

Showing 1 to 2 of 2 entries

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Edit Staff

1. Click on Staff
2. Click on Edit Staff
3. Click on Edit
4. A form will display to edit/update staff information
5. Insert the correct data, and click on update
6. Note: you can also update the Bank Information of the staff here.

The screenshot shows the Jobastech Global Ent dashboard. The left sidebar contains a menu with options: Dashboards, Staff, Add Staff, Approve Staff, Edit Staff (highlighted with a red arrow), Staff List, Member, Loans, Deposit, Reports, Setup, BackUp, and Logout. The main content area is titled 'VIEW STAFF' and contains a table with the following data:

S/N	STAFF NAME	PHONE NUMBER	ACTION
1	YUSUF GABRIEL	09028282822	Edit
2	AKINSANYA TITILOPE	09022222222	Edit

Below the table, it says 'Showing 1 to 2 of 2 entries'. At the bottom of the dashboard, there is a footer with the following information:

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Staff List

1. Click on Staff
2. Click on Staff List

Jobastech Global Ent.

MENU

- Dashboard
- Staff**
 - Add Staff
 - Approve Staff
 - Edit Staff
 - Staff List**
- Member
- Loans
- Deposit
- Reports
- Setup
- BackUp
- Logout

STAFF LIST

Copy Excel PDF Column visibility

Search:

S/N	STAFF NAME	PHONE NUMBER
1	YUSUF GABRIEL	09028282822
2	AKINSANYA TITILOPE	09022222222

Showing 1 to 2 of 2 entries

Previous 1 Next

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Staff Privileges/Permission

1. Click on Setup
2. Click on Staff Privileges
3. Click on Privileges
4. Select True if you want the staff to have access to the task, otherwise select False
5. Click on Update Privileges after you are done

Jobastech
Global Ent.

Dashboard

Staff

Member

Loans

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BackUp

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Search...

OKE ARO

Atansuyi Emmanuel

VIEW STAFF

CopyExcelPDFColumn visibility

Search:

S/N	STAFF NAME	ROLE	ACTION
1	YUSUF GABRIEL	Credit Officer	Privileges
2	AKINSANYA TITIOLOPE	Credit Officer	Privileges

Showing 1 to 2 of 2 entries

Previous1Next

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Search...

OKE ARO

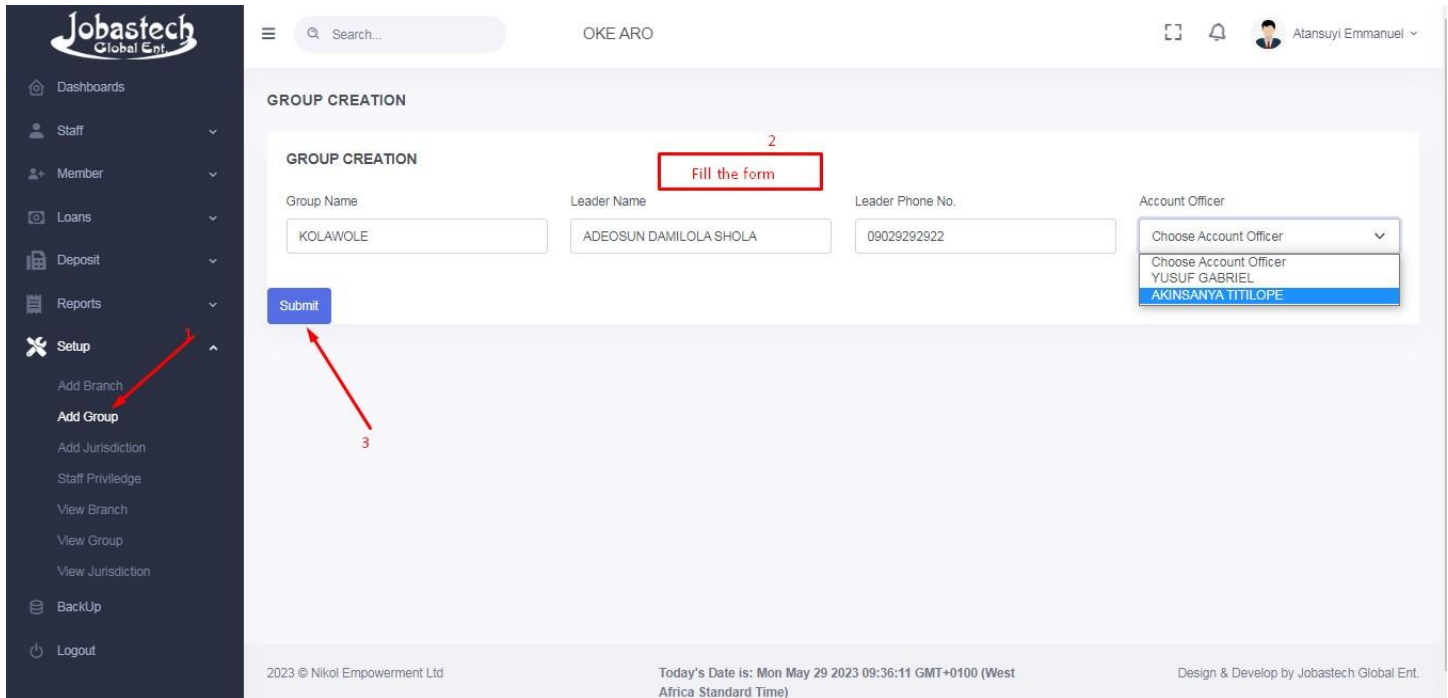
Atansuyi Emmanuel

PRIVILEGES

S/N	Links	Sub Links	User Permission
1	Deposit	Post Entry	True
2	Deposit	Posting Confirmation	False
3	Loans	Confirm Entry	False
4	Deposit	History	True
5	Setup	View Jurisdiction	False
6	Reports	View Reports	False
7	Loans	Loan Repayment	True
8	Loans	Loan History	True
9	Loans	Loan Application Status	True

Add Group

1. Click on Setup
2. Click on Add Group
3. Fill the Group Creation Form
4. Click on Submit



Jobastech Global Ent.

Search...

OKE ARO

Atansuyi Emmanuel

GROUP CREATION

GROUP CREATION

2

Fill the form

Group Name: KOLAWOLE

Leader Name: ADEOSUN DAMILOLA SHOLA

Leader Phone No.: 09029292922

Account Officer: Choose Account Officer (YUSUF GABRIEL, AKINSANYA TITILOPE)

Submit

3

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Confirm Group

1. Click on View Group
2. Click on Approve/Edit
3. Change the status from Inactive to Active
4. Click Update
5. Note: You can also update the Group details here too.

Add Member

1. Click on Member
2. Click on Type of Account select box, select Loan and click Submit
3. Fill up the member form and click on submit

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Global Ent

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Search...

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SELECT ACCOUNT TYPE

Select Account Type

Type of Account

Choose Account Type

Choose Account Type

Daily Saving(DS)

Loan

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OKE ARO

AKINSANYA TITILOPE

Registration Successful. Your member ID is: 018618

MEMBER ACCOUNT CREATION

Member Data

Surname

AKINSANYA

First name

ADENIKE

Other name

IFEOLUWA

Phone Number

09155555555

Email

akinsanyaadenike@gmail.com

Gender

Choose Gender

Group

Choose Group

Means of ID

Choose Means of ID

Means of ID Number

99237320779

Bank Verification Number(BVN)

22253260060

Registration Fee

5000

Upload picture

Choose File

No file chosen

Occupation

BUSINESS

Date of Birth

2012-06-13

State of Residence

OGUN

Residential Address

5, ADERIBIGBE STR. IYANU OLUWA BUS STOP, IFO, LGA

Business Address

5, ADERIBIGBE STR. IYANU OLUWA BUS STOP, IFO, LGA

Next Of Kin Data

Approve Member

1. Click on Member
2. Click on Approve Member
3. Click on Approve

Jobastech Global Ent.

MENU

- Dashboards
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localhost says

Are you sure you want to approve this Member

OK Cancel

REGISTER MEMBERS

Copy Excel PDF Column visibility

Search:

S/N	MEMBER ID	NAME	PHONE NO.	ACCOUNT OFFICER	REG. DATE	GROUP	ACTION
1	508729	SAMUEL IMOLE	09065138173	YUSUF GABRIEL	2023-05-25	IWAJOWA	Details Approve Delete
2	240213	FOLAKE AGUNBIADÉ	09092992292	AKINSANYA TITILOPE	2023-05-25	ORELOPE	Details Approve Delete

Showing 1 to 2 of 2 entries

Previous 1 Next

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Edit Member

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OKE ARO

EDIT MEMBERS

Select Loan Group

Select Loan Group

View Report

Copy Excel PDF Column visibility

Search:

S/N	MEMBER ID	NAME	PHONE NO.	ACCOUNT OFFICER	REG. DATE	GROUP	ACTION
1	240213	FOLAKE AGUNBIADÉ	09092992292	AKINSANYA TITILOPE	2023-05-25	ORELOPE	Edit

Showing 1 to 1 of 1 entries

Previous 1 Next

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View Member

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Search...

OKE ARO

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SELECT ACCOUNT TYPE

Select Account Type

Type of Account

Loan

Submit

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Apply for Loan

1. Click on Loans
2. Click on Apply for Loan
3. Select the Loan Group/Union of the Member
4. Click the Apply for Loan button and fill up the form that appears.

The screenshot shows the Jobastech Global Ent. dashboard. On the left, a dark sidebar contains a 'MENU' with options: Dashboards, Staff, Member, Loans, Apply for Loan, Loan Application Status, Loan Due, Loan History, Loan Repayment, Loan Repayment Status, Deposit, Reports, Setup, BackUp, and Logout. A red arrow points to 'Loans' and another to 'Apply for Loan'. The main content area is titled 'SELECT LOAN GROUP'. It features a 'Loan Group' dropdown menu with 'IWAJOWA' selected. Below this is a table with columns: S/N, MEMBER ID, NAME, PHONE NO., ACCOUNT OFFICER, REG. DATE, and ACTION. The table contains one row for member SAMUEL IMOLE. A red arrow points to the 'Apply for Loan' button in the ACTION column. At the bottom, a footer shows '2023 © Nikol Empowerment Ltd', the current date and time, and 'Design & Develop by Jobastech Global Ent.'

Jobastech Global Ent.

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SELECT LOAN GROUP

Select Loan Group

Loan Group

IWAJOWA

S/N	MEMBER ID	NAME	PHONE NO.	ACCOUNT OFFICER	REG. DATE	ACTION
1	508729	SAMUEL IMOLE	08065138173	YUSUF GABRIEL	2023-05-25	Apply for Loan

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The screenshot shows the Jobastech Global Ent. dashboard with a green success message at the top: 'Loan Application Successful. Your Loan Code is: 34296764'. Below this is the 'LOAN APPLICATION' form. It is divided into two main sections: 'Applicant Data' and 'Guarantor Information'. The 'Applicant Data' section includes fields for Surname (FOLAKE), First name (AGUNBIADI), Other name (ADERIBIGBE), and Phone Number (09092992292). The 'Guarantor Information' section includes fields for Guarantor Name (ADEOLA TOBI), Guarantor Phone Number (08027580601), Relationship (BROTHER), Upload Guarantor Passport (Choose File, No file chosen), Utility Bill (Available), Means of ID (Choose Means of ID), Means of ID Number (222222222222), Guarantor Occupation (BANKER), and Guarantor Address (Aladura B/Stop, Matogun Road, Ogun State). At the bottom, there is a 'Loan Information' section with fields for Loan Type/Tenor, Borrower's Salary/Income, Applied Amount, and App. Date.

Jobastech Global Ent.

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Loan Application Successful. Your Loan Code is: 34296764

LOAN APPLICATION

Applicant Data

Surname First name Other name Phone Number

FOLAKE AGUNBIADI ADERIBIGBE 09092992292

Guarantor Information

Guarantor Name Guarantor Phone Number Relationship Upload Guarantor Passport

ADEOLA TOBI 08027580601 BROTHER Choose File No file chosen

Utility Bill Means of ID Means of ID Number Guarantor Occupation

Available Choose Means of ID 222222222222 BANKER

Guarantor Address

Aladura B/Stop, Matogun Road, Ogun State.

Loan Information

Loan Type/Tenor Borrower's Salary/Income Applied Amount App. Date

Loan Application Status

Jobastech
Global Ent

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OKE ARO

YUSUF GABRIEL

SELECT LOAN GROUP

Select Loan Group

Loan Group

IWAJOWA

SN	Member ID	Loan Number	Member Name	Application Date	Applied Amount	Approved Amount	Interest	Total Payable	Status	Reason
1	508729	69718136	SAMUEL IMOLE IYANU	2023-05-25	20,000.00	15,000.00	3,000.00	18,000.00	Approved	New Loan

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Loan Due

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OKE ARO

YUSUF GABRIEL

SELECT LOAN GROUP

Select Loan Group

Select Loan Group

View Report

Copy Excel PDF Column visibility

SN	Loan Number	Member Name	Granted Date	Expiry Date	Applied Amount	Approved Amount	Total Payable	Loan Type	Status	Duration
1	69718136	SAMUEL IMOLE IYANU	2023-05-25	2023-06-24	40,000	15,000	18,000	Daily	Not Expired	26 day(s) remaining

Showing 1 to 1 of 1 entries

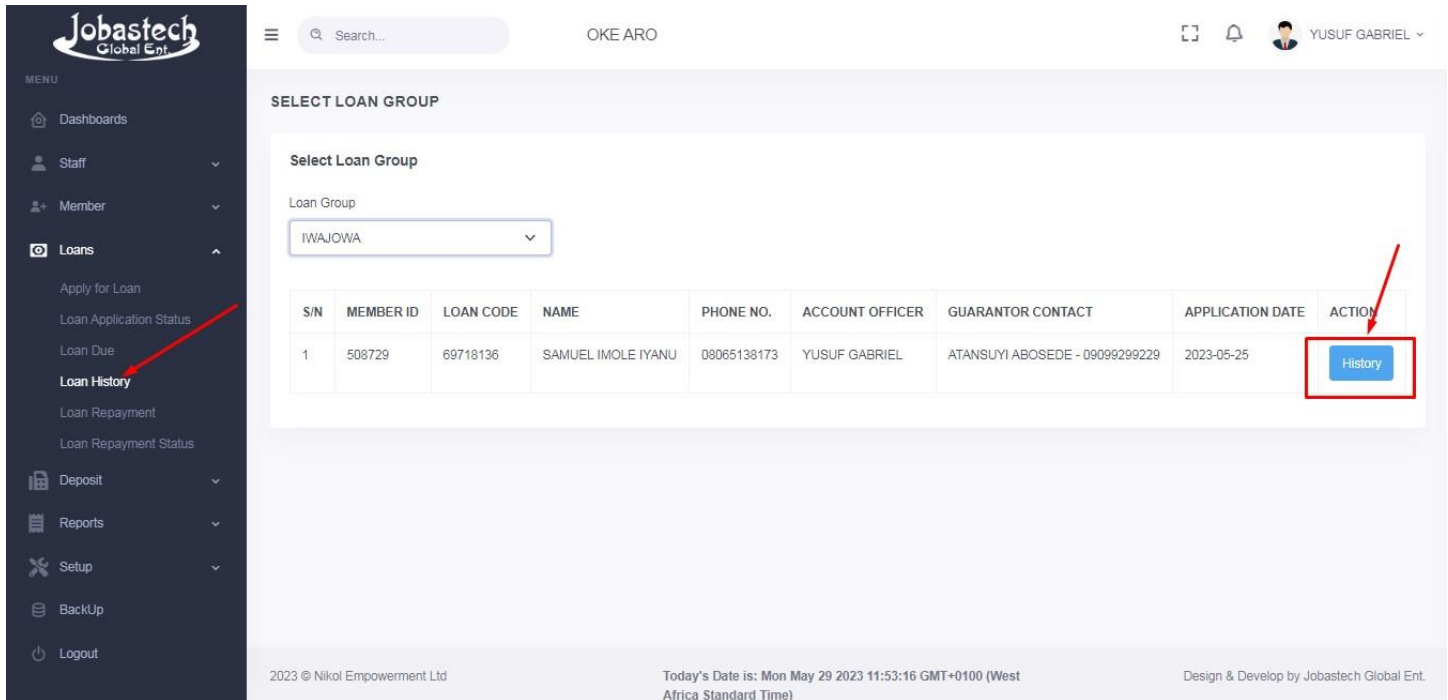
Previous 1 Next

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Loan History



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OKE ARO

YUSUF GABRIEL

SELECT LOAN GROUP

Select Loan Group

Loan Group: IWAJOWA

S/N	MEMBER ID	LOAN CODE	NAME	PHONE NO.	ACCOUNT OFFICER	GUARANTOR CONTACT	APPLICATION DATE	ACTION
1	508729	69718136	SAMUEL IMOLE IYANU	08065138173	YUSUF GABRIEL	ATANSUYI ABOSEDE - 09099299229	2023-05-25	History

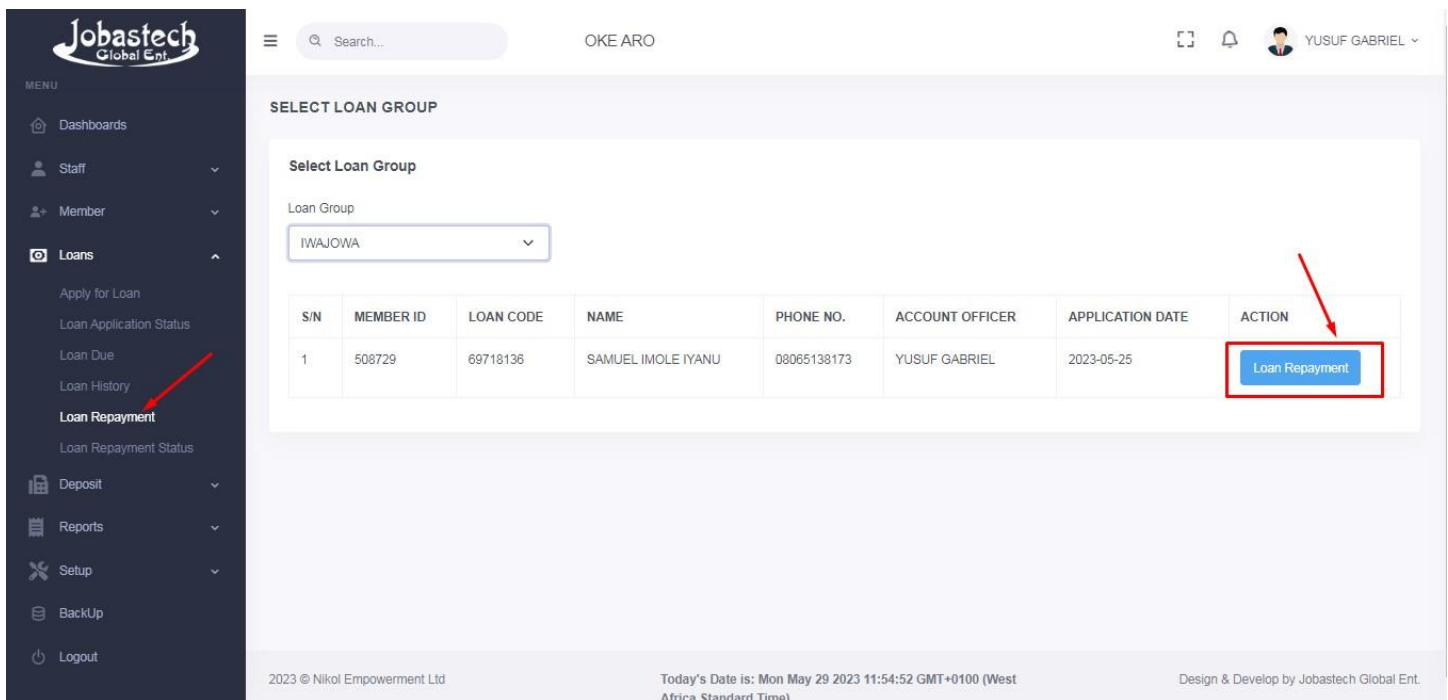
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Loan Repayment

1. Click on Loans
2. Click on Loan Repayment
3. Click on Loan Repayment button
4. Select Credit, enter the amount and narration.



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OKE ARO

YUSUF GABRIEL

SELECT LOAN GROUP

Select Loan Group

Loan Group: IWAJOWA

S/N	MEMBER ID	LOAN CODE	NAME	PHONE NO.	ACCOUNT OFFICER	APPLICATION DATE	ACTION
1	508729	69718136	SAMUEL IMOLE IYANU	08065138173	YUSUF GABRIEL	2023-05-25	Loan Repayment

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OKE ARO

YUSUF GABRIEL

POST LOAN TRANSACTION

Loan Transaction

Name

Loan Granted

Entry Type

Amount

SAMUEL IMOLE IYANU

15000.00

Credit

1,000

Narration

Post

Loan Repayment

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Loan Repayment Status

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Search...

OKE ARO

YUSUF GABRIEL

SELECT LOAN GROUP

Select Loan Group

View Report

Copy

Excel

PDF

Column visibility

Search:

SN	Loan Number	Member Name	Applied Amount	Approved Amount	Interest	Total Payable	Total Paid	Balance
1	69718136	SAMUEL IMOLE IYANU	20,000.00	15,000.00	3,000.00	18,000.00	1,000.00	17,000.00
Total								17,000.00

Showing 1 to 1 of 1 entries

Previous

1

Next

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Loan Disbursement/Approval

1. Click on Loans
2. Click on Pending Loan Application
3. Select **Approve** under Action.
4. Enter the Approve Amount, Comment, Approve Date, and Maturity Date
5. Click on Submit when you are done.

Jobastech Global Ent.

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PENDING LOAN REQUEST

Pending Loan Request

(you can view loan details before confirmation) 2

You can also decline loan 3

Loan Approval Start here 4

SN	Loan Number	Member Name	Application Date	Applied Amount	Action
1	34296764	FOLAKE AGUNBIAD E ADERIBIGBE	2023-05-29	20,000.00	View Details Decline Approve

Showing 1 to 1 of 1 entries

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APPROVE LOAN

APPROVE LOAN

Customer Name: FOLAKE AGUNBIAD E ADERIBIGBE

Customer Group: ORELOPE

Member Account Number: 240213

Loan Code: 34296764

Registration Fee: ₦4,000

Applied Amount: ₦20,000

Loan Tenor: Daily

Approved Amount: 10,000

Comment: New Loan

Approve Date: 2023-05-29

Maturity Date: 2023-06-28

[Approve](#)

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Deposit

1. Click on Deposit
2. Click on Post Entry
3. Fill up all the fields
4. Click on Add Entry. Note: you can add as many accounts you want to add before you click on Post Entry.

Jobastech Global Ent.

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OKE ARO

Press F11 to exit full screen

SELECT LOAN GROUP

Select Loan Group

Loan Group

IWAJOWA

S/N	MEMBER ID	NAME	PHONE NO.	ACCOUNT OFFICER	APPLICATION DATE	ACTION
1	508729	SAMUEL IMOLE IYANU	08065138173	YUSUF GABRIEL	2023-05-25	Make Deposit

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OKE ARO

Members / Member Savings

Member Savings

Account Number

508729

Name

SAMUEL IMOLE IYANU

Trans Type

XC

Entry Type

Credit

Amount

1,000

GL account

100467 Savings Deposit

Entry Type

Debit

Narration

Deposit

Add Entry

SN	Account Number	Customer Name	Entry Type	Amount	Action
Total				0.00	

Post Entry

Confirm Deposit

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localhost says
Are You Sure You Want To Confirm This Transaction

OKCancel

MEMBER SAVINGS CONFIRMATION

Member Savings Confirmation

CopyExcelPDFColumn visibility

Search:

SN	Account Number	Customer Name	Account Officer	Entry Type	Narration	Amount	Action
1	508729	SAMUEL IMOLE IYANU	YUSUF GABRIEL	Credit	Deposit	1,000.00	ConfirmDelete

Showing 1 to 1 of 1 entries

Confirm Entries

Previous1Next

4 Confirm all entries

Confirm Single Entry

Atansuyi Emmanuel

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OKE ARO

YUSUF GABRIEL

SELECT GROUP

Select Group

Group

IWAJOWA

S/N	MEMBER ID	NAME	PHONE NO.	ACCOUNT OFFICER	ACTION
1	508729	SAMUEL SAMUEL	08065138173	YUSUF GABRIEL	<div>History</div>

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OKE ARO

YUSUF GABRIEL

LOAN HISTORY

Loan History

Customer Name: SAMUEL IMOLE IYANU

Member ID: 508729

Copy Excel PDF Column visibility

Search:

SN	Trans Date	Account Number	Account Name	Narration	Debit	Credit	Balance
1	2023-05-29 02:46:33pm	508729	SAMUEL IMOLE IYANU	Deposit	0.00	1,000.00	1,000.00

Showing 1 to 1 of 1 entries

Previous

1

Next

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javascript: void(0);

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REPORTS

Member Reg. Fee

Member Reg. Fee by Group Name

Member by Group Name

View Approved/Pending Loan Request

Loan Granted by Date

Loan by Balance

General Loan Balance

Loan Accounts by Expiry

Loan by Group Name

Loan by Guarantor

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DASHBOARD

Dashboard

Welcome Back !
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191970
User ID

Admin
User Type

Total Registered Member

3

Total Active Member

2

Total Inactive Member

1

Total Disbursed Loan

42,000

Total Loan Repayment

3,000

Total Loan Outstanding

39,000

Total Loan Group

2

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