



CRM

LOANME WIREFRAME VERSION 1.0

8.25.2017

Borrower Types

1. Borrower no loan = lead
2. Borrower no loan with detail info = with details
2. Borrower with loan = with loan
3. Borrower loan paid = settled

A borrower can be entered into the system without a loan.
A Borrower cannot have more than one loan at a time.
A borrower number does not have to have a loan number, but a loan number must have a borrower.

Loan Types

Platinum Plus	62 week loan
Platinum	45 week loan
Gold Plus	25 week loan
Gold	17 week loan
Silver	5 week loan

Borrower Save Types

1. System can save new lead
2. System can save new borrower
3. System can save new borrower with new loan
4. System can save existing borrower with new loan
5. System can save existing borrower paid loan

Status Types

Lead	New Lead
	Bad Lead
	Lead interested
	Lead not interested
Borrower	Application
	Application Declined
	New Underwriting
Borrower also	Approved Underwriting
	Declined Underwriting
	New Signing
	Doc Signing Date Not Set
	Doc Signing Date Set
	Docs Back
	Funded/New Servicing File

ID Types

Borrower#

Lead ID

ID# 12345678

8 digits

Loan#

A loan ID always includes a borrower ID.

Loan ID

ID# 12345678 -123

8 digits 3 digits

TOOLBAR

NEW LEAD

6

USER

7

SETTINGS

8

LoanMe CRM

+ New Lead

User Name



Dashboard

1

Dashboard

3

Leads

Borrowers

2

4

Reports

Marketing

5

HEADLINE

CONTENT AREA

TREEVIEW

Status bar to be implemented at later date.

STATUS BAR

User log In

Incorrect username or password.

Username

Password

Log In

USER LOG IN

Username and Password are one word and excluding colons. "Log In" not "Logon".

Dashboard

Dashboard

1

Dashboard

Leads

Borrowers

Reports

Marketing

MY LEADS

150

MY BORROWERS

100

MY LOANS

50

MY LEADS

Promo teams	5
Flyers	0
Internet leads	0
Banners	2

VIEW MY LEADS

MY LOAN STATUSES

New Lead	20
Bad Lead	30
Interested	15
Not Interested	26
Application	25
Application Declined	84
New Underwriting	52
Approved Underwriting	32
Declined Underwriting	54
New Signing	65
Doc Signing Date Not Set	52
Doc Signing Date Set	65
Docs Back	25
Funded/New Servicing File	30

VIEW MY BORROWERS

MY LOAN PROGRAMS

62 Week core	10
45 Week core	20
25 Week core	30
17 Week core	15
5 Week core	1

VIEW MY LOANS

DASHBOARD (default screen)

System will navigate to Dashboard after log in. Overview information about users clients and totals will be shown here.

Borrowers List View

LoanMe CRM
+ New Lead
User Name

- Dashboard
- Leads
- Borrowers
- Reports
- Marketing

Borrowers

All Borrowers

BORROWER NAME	ID#	PHONE	EMAIL	LOAN STATUS	LOAN AMT	PAYMENT AMT	NEXT PAYMENT	PREVIOUS LOANS	EDIT
John Donovan				Application					
Stac Cran				Application					
Jeff Hall				Application					
Mike Teno				Application					
Steve Cray				Application					
John Donovan				Application					
Stacy Cran				Application					
Jeff Hall				Application					
Mik Teno				Application					
Steve Cray				Application					

Go to screen 6.2

2

All Borrowers

- All Borrowers
- My Borrowers without loans
- My Borrowers with loans
- My Borrowers paid

- All Loans
- My Loans
- My Loans paid

- Edit Info
- Edit income
- Edit expenses
- Edit status

Borrower currently has pending loan.

CANCEL
VIEW

Names are clickable

Click to create a new loan for this borrower.
If borrower in status, produce dialog.

BORROWERS
Borrowers will show borrower list. List is searchable. Clicking pen icon opens menu. Clicking plus icon creates new loan for this borrower and navs into the new loan screen.

Borrower Info

(After clicking on the Borrower name, the user will nav to this page.)

LoanMe CRM + New Lead User Name Settings

John Donovan ID# 1056194101

BORROWER INFO INCOME EXPENSES LOAN DETAILS STATUS LOAN HISTORY

BORROWER		CO-BORROWER	
First name	John	First name	John
Last name	Donovan	Last name	Donovan
Street	536 Elm	Street	536 Elm
City	Warsaw	City	Warsaw
Zip	Calif	Zip	Calif
Phone	92652	Phone	92652
Email	john@gmail.com	Email	john@gmail.com
Pesel#	45454	Pesel#	45454
Use of funds	House stuff	Use of funds	House stuff
Occupation	Employed / Unofficial income / Pension	Occupation	Employed / Unofficial income / Pension
Car	Yes / No	Car	Yes / No
Marital status	Married / Single / Divorced	Marital status	Married / Single / Divorced
Education	University / High school / Basic	Education	University / High school / Basic
Home	Own / Rent / Subsidies / With family	Home	Own / Rent / Subsidies / With family
Bank account	Yes / No	Bank account	Yes / No

[Click to edit this page](#)

EDIT EXAMPLE FROM 2.1

LoanMe CRM + New Lead User Name Settings

John Donovan ID# 1056194101

EDIT BORROWER INFO

BORROWER	CO-BORROWER
First name: John	First name: Stacy
Last name: Donovan	Last name: Donovan
Street: 536 Elm	Street: 536 Elm
City: Warsaw	City: Warsaw
Zip: 95656	Zip: 95656
Phone: 555.121.2323	Phone: 555.121.2323
Email: john@gmail.com	Email: john@gmail.com
Pesel#: 45454	Pesel#: 45454
Use of funds: House stuff	Use of funds: House stuff
Occupation: Employed / Unofficial income / Pension	Occupation: Employed / Unofficial income / Pension
Car: Yes / No <input checked="" type="radio"/> <input type="radio"/>	Car: Yes / No <input checked="" type="radio"/> <input type="radio"/>
Marital status: Married / Single / Divorced	Marital status: Married / Single / Divorced
Education: University / High school / Basic	Education: University / High school / Basic
Home: Own / Rent / Subsidies / With family	Home: Own / Rent / Subsidies / With family
Bank account: Yes / No <input checked="" type="radio"/> <input type="radio"/>	Bank account: Yes / No <input checked="" type="radio"/> <input type="radio"/>
Co-Borrower: Yes / No <input checked="" type="radio"/> <input type="radio"/>	

CANCEL SAVE

EDIT BORROWER INFO

Example of the editor for borrower information. By default, don't show co-borrower until "Co-Borrower" is clicked yes.

Borrower Income

John Donovan

ID# 1056194101

- BORROWER INFO
- INCOME
- EXPENSES
- LOAN DETAILS
- STATUS
- LOAN HISTORY

- Dashboard
- Leads
- Borrowers
- Reports
- Marketing

ITEM	AMOUNT	
Employment income	100 zł	
Pension income	100 zł	
Other income	100 zł	
TOTAL	500 zł	

Click to edit this page

Borrower Expenses

LoanMe CRM
+ New Lead
User Name

John Donovan
ID# 1056194101

- Dashboard
- Leads
- Borrowers
- Reports
- Marketing

BORROWER INFO
INCOME
EXPENSES
LOAN DETAILS
STATUS
LOAN HISTORY

ITEM		TYPE	BALANCE	MONTHLY PMT
HOUSING EXPENSES				
Home	Individual	Rent / Mortgage	4500.00 zl	\$200.00 zl
Home	Individual	Rent / Mortgage	4500.00 zl	\$200.00 zl
Home	Individual	Rent / Mortgage	4500.00 zl	\$200.00 zl
AUTO EXPENSES				
Home	Individual	Loan	4500.00 zl	\$200.00 zl
Home	Individual	Fuel	4500.00 zl	\$200.00 zl
Home	Individual	Repairs	4500.00 zl	\$200.00 zl
Home	Individual	Insurance	4500.00 zl	\$200.00 zl
UNSECURED CREDIT				
Home	Individual	Credit cards	4500.00 zl	\$200.00 zl
Home	Individual	Bank loans	4500.00 zl	\$200.00 zl
Home	Individual	Other loans	4500.00 zl	\$200.00 zl
TOTAL			500 zl	500 zl

Click to edit this page

EXPENSES PAGE {Editable info}

Borrower Loan Details

LoanMe CRM + New Lead User Name Settings

John Donovan ID# 1056194101

BORROWER INFO INCOME EXPENSES **LOAN DETAILS** STATUS LOAN HISTORY

CURRENT LOAN DETAILS

Disposable income	500 zl Flyer	
Loan status	62 week core	
Lead source	500 zl	
Loan program	500 zl	
Loan amt	1/1/2015	
Payment amt	Steve K.	
Next payment		
Agent		

Borrower Status

LoanMe CRM + New Lead User Name Settings

John Donovan ID# 1056194101

BORROWER INFO INCOME EXPENSES LOAN DETAILS STATUS LOAN HISTORY

Dashboard Leads **Borrowers** Reports Marketing

✓	Lead	
✓	Application	
	Approved Underwriting	
	Docs Back	
	Funded / New Servicing File	
	In Default	

STATUS TYPES

New Lead, Bad Lead, Lead interested, Lead not interested

Application, Application Declined

New Underwriting, Approved Underwriting, Declined Underwriting

New Signing, Doc Signing Date Not Set, Doc Signing Date Set, Docs Back

Funded / New Servicing File

In Default

Click to edit this page

Borrower Loan History

LoanMe CRM
+ New Lead
User Name

John Donovan
ID# 1056194101

- Dashboard
- Leads
- Borrowers
- Reports
- Marketing

BORROWER INFO
INCOME
EXPENSES
LOAN DETAILS
STATUS
LOAN HISTORY

#	LOAN#	LOAN PROGRAM	LOAN AMOUNT	PAYMENT AMOUNT	DATE SETTLED	VIEW DETAILS
1	12345678 - 100	62 week core	2000 zl	200 zl	1/1/2015	
2	12345678 - 101	62 week core	2000 zl	200 zl	1/1/2015	
3	12345678 - 102	62 week core	2000 zl	200 zl	1/1/2015	

Leads

LoanMe CRM + New Lead User Name Settings

Leads

- Dashboard
- Leads**
- Borrowers
- Reports
- Marketing

BORROWER NAME	ID#	PHONE	EMAIL	EDIT	
<u>John Donovan</u>					Go to screen 6.2
<u>Stac Cran</u>					
<u>Jeff Hall</u>					
<u>Mike Teno</u>					
<u>Steve Cray</u>					
<u>John Donovan</u>					
<u>Stacy Cran</u>					
<u>Jeff Hall</u>					
<u>Mik Teno</u>					
<u>Steve Cray</u>					

3

LEADS

Reports in progress

LoanMe CRM

+ New Lead

User Name

Settings

Reports

- Dashboard
- Leads
- Borrowers
- Reports**
- Marketing

?????					
???					
???					

4

REPORTS
Content must be filled by Admin.

Marketing

LoanMe CRM + New Lead User Name Settings

Marketing

MARKETING ID	DATE START	DATE END	TYPE	VIEW COLLATERAL
54521	1/25/2015	1/23/2015	Poster	
54874	1/25/2015	1/23/2015	Flyer	
32659	1/25/2015	1/23/2015	TV ad	

- Dashboard
- Leads
- Borrowers
- Reports
- Marketing**

5

MARKETING
See 7.1 for Marketing admin panel.

New Lead (borrower not in system)

6

The wireframe shows the 'New Lead' form in the LoanMe CRM. The top navigation bar includes the 'LoanMe CRM' logo, a '+ New Lead' button (highlighted with a red box), a 'User Name' dropdown, and a settings gear. A dark sidebar on the left contains menu items: Dashboard, Leads, Borrowers, Reports, and Marketing. The main content area has a green header 'New Lead' and a form with three input fields: 'First name' (containing 'John'), 'Last name' (containing 'Donovan'), and 'Phone number' (containing '11 222 33 44'). Below the form are two buttons: a green 'CREATE LEAD' button and a grey 'CREATE NEW LOAN' button. Red annotations include: a note pointing to the 'CREATE LEAD' button stating 'Check to see if borrower is in the system. If yes, then go to 6.1. If no, go to 6.2'; a note pointing to the 'CREATE LEAD' button stating 'Saves borrower info level 1'; and a note pointing to the 'CREATE NEW LOAN' button.

Check to see if borrower is in the system.

If yes, then go to 6.1.
If no, go to 6.2

Saves borrower info level 1

NEW LOAN

A note about borrower info levels. A borrower could back out of the process at any time. Each time level button is pressed, more information is added to the client tables. All information about the client is reached at level 5.

New Lead (borrower in system)

LoanMe CRM + New Lead User Name Settings

New Lead

- Dashboard
- Leads
- Borrowers
- Reports
- Marketing

Borrower in system

ID# 1056194101

John Donovan

Loan #123

Status: Paid

Borrower is in good standing.

First name

Last name

Phone number

Current borrower found in system

Go to 6.2

Gray out if borrower has pending loan.

Borrower pre-qualify

LoanMe CRM + New Lead User Name Settings

John Donovan ID# 1056194101 Create File #

PRE QUALIFICATION

Lead source:

What is your monthly income?

What are your monthly living expenses?

How much do you need to borrow?

What is the purpose of the loan?

How would you rate your credit?

Very good
Good
Bad

Button updates disposable income and go buttons on right.

QUALIFY Saves borrower info level 2

Monthly disposable income		500 zl
Platinum Plus	62 weeks	<input type="button" value="GC"/> Not qualified
Platinum	45 weeks	<input type="button" value="GC"/> Not qualified
Gold Plus	25 weeks	<input type="button" value="GO"/>
Gold	17 weeks	<input type="button" value="GO"/>
Silver	5 weeks	<input type="button" value="GC"/> Go to 6.3

BACK

Borrower Info

LoanMe CRM + New Lead User Name ▼ ⚙️

John Donovan ID# 1056194101

Disposable income: 500 zł
Program: 5 weeks

BORROWER INFO

BORROWER	CO-BORROWER
First name: John	First name: Stacy
Last name: Donovan	Last name: Donovan
Street: 536 Elm	Street: 536 Elm
City: Warsaw	City: Warsaw
Zip: 95656	Zip: 95656
Phone: 555.121.2323	Phone: 555.121.2323
Email: john@gmail.com	Email: john@gmail.com
Pesel#: 45454	Pesel#: 45454
Use of funds: House stuff	Use of funds: House stuff
Occupation: Unofficial Income	Occupation: Employed / Unofficial income / Pension
Marital status: Divorced	Marital status: Married / Single / Divorced
Education: High School	Education: University / High school / Basic
Home: Subsidies	Home: Own / Rent / Subsidies / With family
Car: Yes / NO	Car: Yes / No
Bank account: Yes / No	Bank account: Yes / No
Co-Borrower: Yes / No	

RESET BACK NEXT

if yes display this

Saves borrower info level 3

New Borrower Income

LoanMe CRM + New Lead User Name Settings

John Donovan ID# 1056194101

BORROWER INCOME Disposable income: 500 zl
Program: 5 weeks

From employment



From pension

Unofficial income

BACK NEXT

Saves borrower info level 4

New Borrower Expenses

+ New LeadUser Name

John Donovan ID# 1056194101

BORROWER EXPENSES



Disposable income: 500 zl
Program: 5 weeks

Rent / Mortgage	Car repairs
Usable costs	Car insurance
Telephone	Credit cards
Home insurance	Loan in a bank
Credit / Loan	Loan in other companies
Fuel	

BACK NEXT

Saves borrower info level 5
Last one.

New Borrower Loan Details

+ New Lead User Name 

John Donovan ID# 1056194101

LOAN DETAILS

Disposable income: 500 zl
Program: 5 weeks

Disposable income	500 zl
Lead source	Flyer
Loan program	5 week
Loan amt	500 zl
Payment amt	500 zl
Next payment	1/1/2015
Agent	Steve K.

[BACK](#) [CREATE](#)

- Dashboard
- Leads
- Borrowers
- Reports
- Marketing

New Borrower Loan Summary



John Donovan

ID# 1056194101

Disposable income: 500 zl
Program: 5 weeks

SUMMARY

Client loan is complete!

Please give Borrower the loan information below.

ID# 1056194101 - 100

Loan program 5 week

Total loan amount 500 zl

Weekly payment amount 500 zl

First payment due 1/1/2015

Agent name Steve K.

First name John

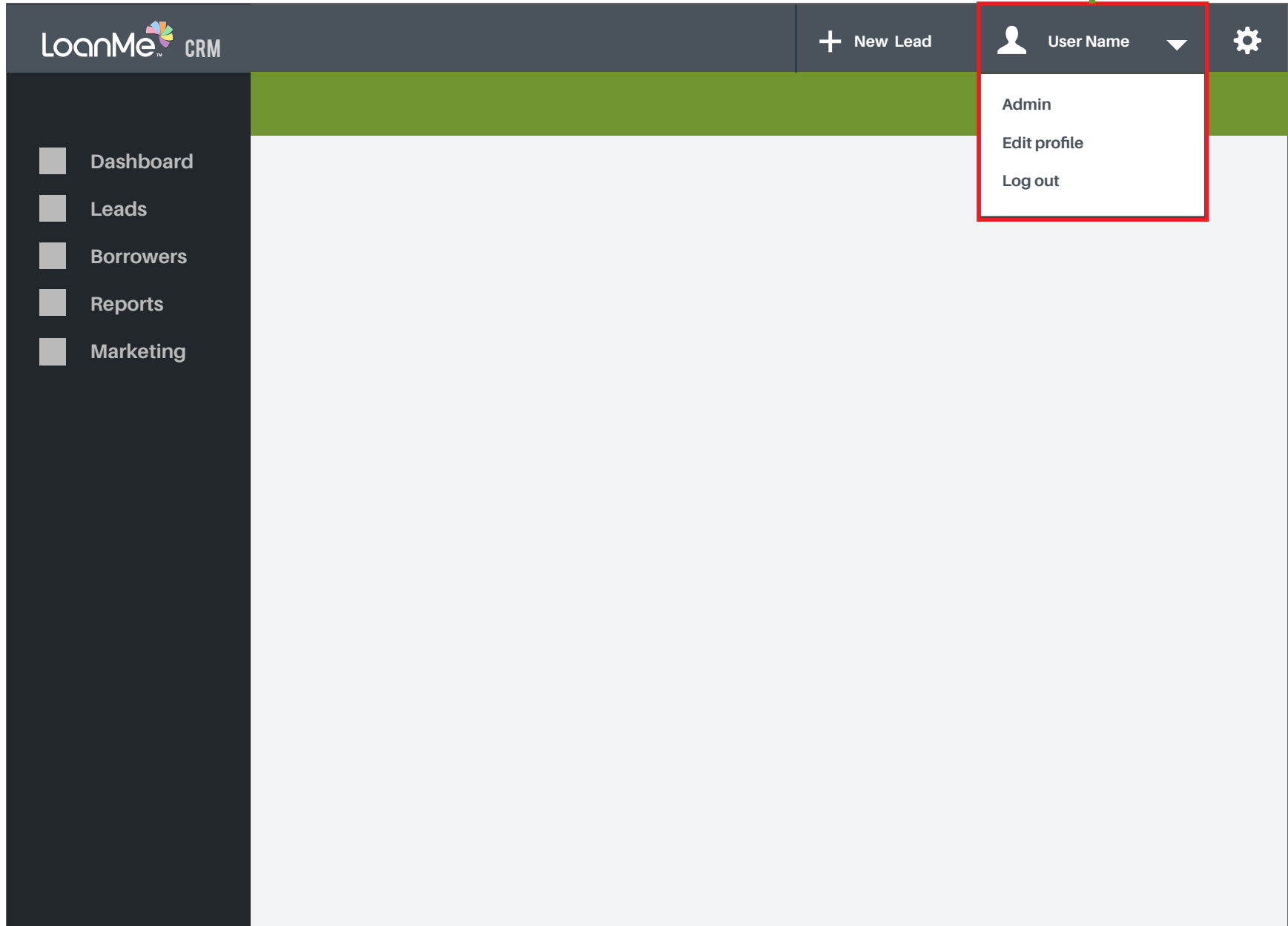
Last name Donovan

Lead source Flyer

- Dashboard
- Leads
- Borrowers
- Reports
- Marketing

User options



7



USER ACCOUNT

Drop down menu provides profile editor, admin and user log out.

Admin Panel / Marketing Sources / list

+ New LeadUser Name ▼



Admin

- Dashboard
- Leads
- Borrowers
- Reports
- Marketing

Marketing Sources

Loan Programs

Users

MARKETING ID	DATE START	DATE END	TYPE	VIEW	
54521	1/25/2015	1/23/2015	Poster		
54874	1/25/2015	1/23/2015	Flyer		
32659	1/25/2015	1/23/2015	TV ad		

Edit

Admin Panel / Marketing Sources / Edit

LoanMe CRM

+ New Lead

User Name

Admin

Marketing Sources

Loan Programs

Users

Marketing items	
1	54521
2	54874
3	32659

Start: 08/31/2015

End: 08/31/2015

Type: Select

Flyer

Poster

Billboard

New

Enter name of new type

CANCEL SAVE

CANCEL OK

Calendar: August 2015, September 2015

Admin Panel / Loan programs / List

[+ New Lead](#)

User Name ▼

- Dashboard
- Leads
- Borrowers
- Reports
- Marketing

Admin

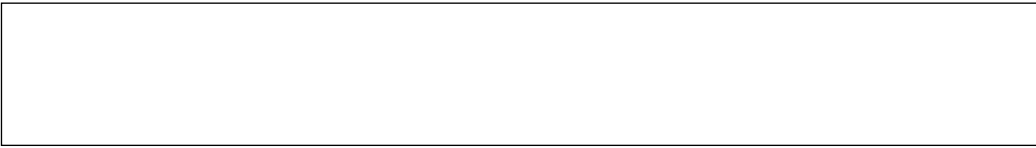
Marketing Sources

Loan Programs




Users

LOAN PROGRAM	NET LOAN	ACTUAL NET LOAN	APR	
62 week				
45 week				
25 week				

[Edit](#)



Admin Panel / Loan programs / Edit

+ New LeadUser Name 

Admin

- Dashboard
- Leads
- Borrowers
- Reports
- Marketing

Marketing Sources

Loan Programs

Loan programs	
1	62 week
2	45 week
3	25 week
4	17 week
5	5 week

Users

45 week

Net loan amount:

Lim doc / Not reg add:

No doc:

Neg collection balance:

Grading:



Loan amount range 1,000 - 11,000
Max loan amount 1,000

Actual net loan	850
Rate	10.00%
Loan amount	1,000.00
Prep fee (pts)	15.00%
Interest	109.01
Prep fee	150.00
Servicing fee	866.67
Total fees	1,125.67
Total payments	1,975.67

APR 130.44%

CANCEL **SAVE**


Admin Panel / Users / view

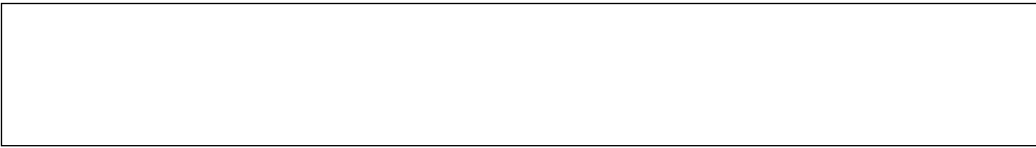
+ New LeadUser Name ▼

Admin




- Dashboard
- Leads
- Borrowers
- Reports
- Marketing

- Marketing Sources
- Loan Programs
- Users**

NAME	ROLE	START DATE	END DATE	
Walter Ledda				
Borat Creski				
Czer Keznski				

Edit

Admin Panel / Users / Edit

+ New Lead User Name ▼

Admin

- Dashboard
- Leads
- Borrowers
- Reports
- Marketing

- Marketing Sources
- Loan Programs
- Users**

+ -

User list	
1	Walter Ledda
2	Borat Creski
3	Czer Keznski

First name

Last name

Email

Start date

End date

Password

Re-enter password

Role

- Manager
- Admin
- Sales
- New

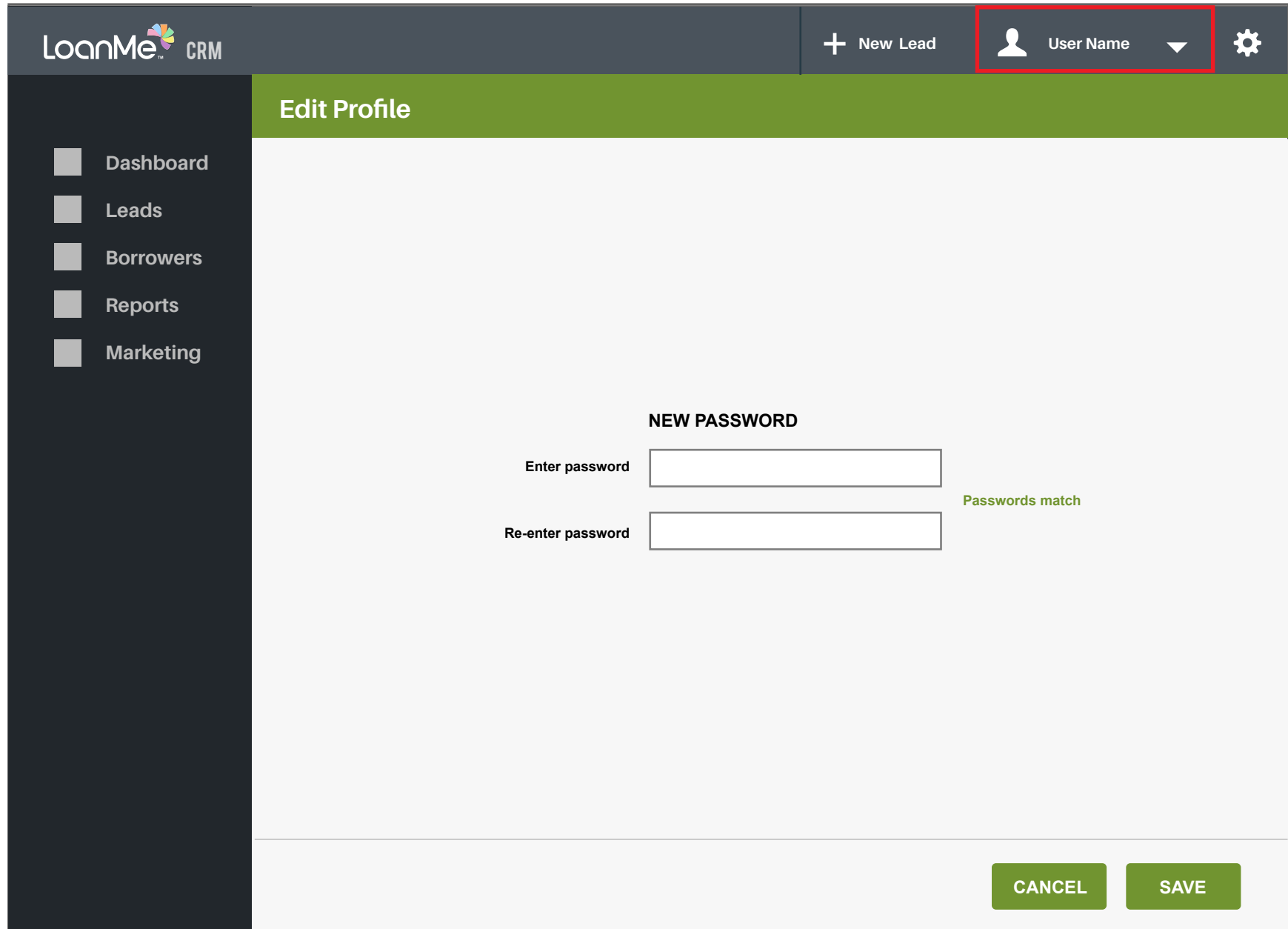
Enter name of new role

OK

CANCEL SAVE

LOANME WIREFRAME | 7.6

Change Password



The image shows a web application interface for changing a password. At the top left is the 'LoanMe CRM' logo. The top navigation bar includes a '+ New Lead' button, a 'User Name' dropdown menu (highlighted with a red box), and a settings gear icon. Below the navigation bar is a green header for the 'Edit Profile' section. On the left is a dark sidebar with menu items: Dashboard, Leads, Borrowers, Reports, and Marketing. The main content area is titled 'NEW PASSWORD' and contains two input fields: 'Enter password' and 'Re-enter password'. A green message 'Passwords match' is displayed to the right of the second field. At the bottom right of the form are two buttons: 'CANCEL' and 'SAVE'.

Log out

You are now logged out.

Username

Password

Log In

Log out not Log off.



Settings

- Dashboard
- Leads
- Borrowers
- Reports
- Marketing

Language

SETTINGS
Settings can be accessed from the gear icon.