

## **EVOLUTION LOANS MANAGER SOFTWARE**

### **Evolution Loans Manager Documentation**

The Evolution Loans Manager is a business solution software created and designed by Evolution Media Group to enable Financial Institutions properly manage complex business transactions, securely store data and ease complex money-related business calculations.

The Software is subscription-based and the different rates are detailed in this documentation

The main organizational goal of the software is to enable businesses make critical decisions on how to run their firms.

The information entered is stored locally on the Client's Computer and can easily be retrieved without necessarily using an internet connection. An Internet Connection is only required when backing up the data. The Data being backed up is stored on the Evolution Media Group Servers and can always be retrieved whenever the firm needs it.

Information about how to back up the information is provided in the software.

The Software has features that enable firms make short-term and long-term decisions and these features have been tried and tested in and proven to be functional and accurate depending on the information fed into the software by the users.

These features/Modules include:

#### **User data Storage and Management:**

The Software enables the firm/organization create accounts for its clients. The software seeks the client data to enable it run its operations swiftly and accurately.

It enables registering of users names, current bank account details, Gender, Marital Status, Date Of Birth, Contact Details (Phone Numbers, email Addresses), place of residence, nationality, spouse and profile picture.

This information can be modified/edited, or even deleted.

After registering a user, the system automatically gives the user a unique Account Number which is attached on every report about that user as identification.

This information is stored and can be searched to be used in the different operations of the software.

#### **The Loans Management Module:**

##### **-Loan Registration:**

The Loans Management Module enables the firm/organization to register a loan taken by a client. The Software registers information concerning the loan taken like the principle (Amount Required), the Loan Term, Repayment Method, Number Of Installments, period within which installments are to be made, Interest Rate, date the Loan was acquired, the purpose of the loan, the guarantors, the security and the details about each specific security entered.

### -Loan Repayment Schedule:

The Information is stored and used by the Software in creating the Loan Repayment Schedule and the different reports about that specific loan.

### -Loan Installment Registration:

This module also enables the firm to register each payment made by the client and the date of that payment and how much has been paid. This enables the firm to keep track of payments being made and enables the software to predict when the next installment of the loan will be made and how much is to be paid according to the interest rate and the Loan Term.

### -Loan Repayment Reminders

The Loan Management Module also possesses the ability to provide reminders about when a loan is supposed to be paid and when the payment is overdue (See pic below).

At the end of the table in the Screenshot below, you'll see a row called **Status** which has all the Reminders/Statuses of each loan taken respectively.

Full Name	Date Acquired	Amount Imbursed	Date Loan recorded	Amount to be paid (with interest)	Latest Installment	Date Of Installment	Remaining Amount	Next Date Of Payment	Status
Dr. Ogwal Bazilio	14th July 2017	4,300,000	14th July 2017	4,730,000	946,000 (Monthly)	14th July 2017	2,838,000	15th October 2017	2 months to the next installment
Dr. Ogwal Bazilio	15th May 2017	67,000,000	15th May 2017	80,400,000	No Installment made yet (Monthly)	No Installment made yet	80,400,000	15th June 2017	Overdue
Dr. Ogwal Bazilio	11th May 2017	54,000,000	21st May 2017	59,400,000	11,880,000 (Monthly)	02nd July 2017	35,640,000	12th August 2017	23 days to the next installment
Eng. Gideon Mugisa	06th February 2017	8,900,000	15th May 2017	10,680,000	100,000 (Monthly)	04th June 2017	10,380,000	10th June 2017	Overdue
Mr. Ahindura Martin	07th June 2017	30,000,000	02nd July 2017	33,000,000	No Installment made yet (Monthly)	No Installment made yet	33,000,000	08th July 2017	Overdue

### -Loan Sorting

The Module also possess the ability to sort the Loan information according to a month (For Example All **Loans taken in January**) Or Sort them by Amount (Amount to be paid back with interest). This solution enables the firm to make critical future decisions depending on this data.

### -Loan Report Printing

The Module also provides the ability for the firm to create print reports on each stage of the Loan Registration and Repayment. From the time the Loan is acquired by the client a report is created, a report about the status of the Loan and the Reminders, A report about the Sorted Loans, a report about the repayment schedule and a report when the Loan is fully paid.

### The Savings Management Module:

The Savings Module enables firms to manage how their clients' savings are run.

Users who utilize the Savings module are required to already be registered members and must possess account number in the system.

The Savings Module also enables the firm to create Savings Groups for the users which enables the users to save in groups.

The Module enables the firm to register Deposits and Withdrawals made by a user to his/her Savings Account. This enables the firm to easily track the deposit and withdrawal of money.

The Module also enables the firm to sort and filter the Savings per month, it can filter and display Withdrawals made in a specific month or Deposits made in a specified month. This is crucial to decision since it makes it easy for the firm management to review.

The Module also possesses the ability to print reports of all types pertaining to Savings. Reports produced include: Report on all Deposits in a month, Report on all withdrawals in a month, Report displaying all members in a savings group, Report Showing all Group Deposits and Report Showing All Group Withdraws. All these reports are crucial to business decision making.

### **The Asset Management Module:**

The Asset Module enables firms to manage their assets.

Its enables the registration of Assets details, assigning the assets to persons. Information captures about an assets includes: Asset Description, Asset Type, Asset Make, Asset Model, Asset Manufacturer, Asset Serial Number, Asset barcode, Asset Condition, Purchase Cost, to whom it has been assigned, the image of the asset and the Status of the Asset.

This information can be modified/Edited, and/or Deleted. It can also be retrieved at any time and periodical reports are made of it.

### **The Shares Management Module:**

The Share Module enables firms manage how their clients buy and sell shares.

The Modules possess the ability to register a bought share, all clients buying shares are required to be registered members of the software. Information captured about the shares is the shareholder name, the shareholder number (The account Number of the user), the date of buying, number of shares bought, the value of the shares at the time of buying and the value of all bought shares.

A report is produced by the system about the bought share immediately after the share is registered into the system. This report can be printed into PDF format.

A Report of all shares bought can also be printed for organizational decision making and analysis purposes.

### **The Back Up Functionality:**

To ensure that data is not lost due to problems with the local System running the Software, the backup functionality enables the Firm or User of the software to periodically send his/her data to the Secure and Protected Evolution Media Group server for strictly storage purposes. This functionality is inbuilt within the system and all instructions on how to back up are provided within the Software itself.

We give a provision to all our subscribing clients to retrieve the data from our servers any time they need it free of charge.

### **Guidance and Support**

We provide Support to all people and firms using the software to manage their finances on our Website [www.evolutionug.com](http://www.evolutionug.com).

After you Visit the Website You can Go to the link of **Software**, a dropdown will show up which has SOMESA Software and Loans Manager Software, click on Loans Manager Software, On the page of Loans Manager Software scroll down and find a button names **Support**, click on it and you'll get all the Support you need. Thanks.

### **PRICING:**

**TYPE: BASIC**

PRICE: 500, 000/=

Subscription: 200, 000/= (per year)

FEATURES:

Client Registration and Full Management

Loan Registration and Management

Loan Reports and Printing

Loan Repayment Reminders

Loan Sorting

**TYPE: COMPACT**

PRICE: 800, 000/=

Subscription: 300, 000/= (per year)

FEATURES:

Client Registration and Management

Loan Registration and Management

Loan Reports and Printing

Loan Repayment Reminders

Loan Sorting and Reporting

Asset Management

Shares Management

Data Back Up

**TYPE: PREMIUM**

PRICE: 3, 000, 000

Subscription: 500, 000/=

FEATURES:

Client Registration and Management

Loan Registration and Management

Loan Reports and Printing

Loan Repayment Reminders

Loan Sorting and Reporting

Client Savings and Savings Management

Savings Reports and Printing

Sorting Savings

Asset Management

Shares Management

Data Back Up